



# What About Us?

Global Perspectives on  
Redressing Religious Inequalities

Edited by Mariz Tadros

 institute of  
development  
studies

 CREID  
Coalition for Religious Equality  
and Inclusive Development

### **Praise for *What About Us?***

This inspiring book draws attention to a blind spot in development thinking and action. After this book, the depth and extent of religious inequalities can no longer be overlooked. Readers personally affected by religious discriminations will recognise that they are not alone. Their struggles for equality and tolerance are found in many forms all over the world.

(Robert Chambers, Research Associate, Institute of Development Studies)

Human rights mechanisms do not only rely on legal instruments for their effectiveness. They also benefit from analyses of how norms are received locally. This book presents rich offerings that can help us better advance freedom of religion or belief in ways that connect with realities on the ground and can prove more meaningful.

(Professor Nazila Ghanea, UN Special Rapporteur on freedom of religion or belief)

Inequalities today drive polarisation and rage across the world, yet action to address them falls far short of what is sorely needed. This book's exploration of the complex and interconnected religious dimensions of inequality opens paths towards understanding and response.

(Katherine Marshall, Senior Fellow, Berkley Center for Religion, Peace, and World Affairs, Georgetown University; Professor of the Practice, Walsh School of Foreign Service, Georgetown University; and Executive Director, World Faiths Development Dialogue)

Both social science and public policy struggle to accommodate the many ways in which religious convictions, sensibilities, experiences, and identities shape the lives of billions of people every day. But effectively redressing the inequities and discrimination that so frequently accompany religion – and beliefs of all kinds, including atheism – requires responses grounded in evidence, theory, political support, and a willingness by all of us to engage in sustained respectful dialogue. The contributions to this volume, which are at once insightful, careful, and practical, go a long way to moving us in this more positive direction.

(Michael Woolcock, World Bank and Harvard University)

### **About CREID**

The Coalition for Religious Equality and Inclusive Development (CREID) provides research evidence and delivers practical programmes which aim to redress poverty, hardship, and exclusion resulting from discrimination on the grounds of religion or belief. CREID is an international consortium led by the Institute of Development Studies (IDS) and funded by UK aid from the UK government. Key partners include AI-Khoei Foundation, Minority Rights Group (MRG), and Refcemi.

Find out more: <https://creid.ac/>



# **What About Us?**

## **Global Perspectives on Redressing Religious Inequalities**

**Edited by Mariz Tadros**  
Institute of Development Studies,  
University of Sussex, United Kingdom



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# Abstracts and keywords

## PART 1: INTRODUCTION

### **Redressing Religious Inequalities and Challenging Religious Otherization – Global Perspectives and Encounters**

Mariz Tadros

**Abstract** How can we make religious equality for those on the margins of society and politics a reality? This book is about the individual and collective struggles of the marginalised to be recognised and their inequalities, religious or otherwise, redressed. It is also about the efforts of civil society, governments, multilateral actors, and scholars to promote inclusive policies that are mindful of the realities of marginalised people. Section 1 outlines the rationale and the approach. Section 2 highlights some of the conundrums associated with naming and framing freedom of religion or belief and religious inequalities. Section 3 explores approaches that seek to redress religious otherization and exclusion in education, health, and economic inclusion policies. Section 4 highlights the tensions between national development policies and the rights of people on the margins whose violations are both economic and religio-cultural. Section 5 discusses the disconnects between rhetoric and practice in multilateral agencies' engagement with religious pluralism in a variety of contexts. Section 6 concludes.

**Keywords** freedom of religion or belief, religious inequalities, religious otherization, development, social change.

## PART 2: RELIGIOUS INEQUALITIES IN EDUCATION, HEALTH AND ECONOMIC WELLBEING

### **Intercultural Training, Interfaith Dialogue, and Religious Literacy: Minority Groups in the Israeli Health-Care System**

Miriam Feldmann Kaye

**Abstract** This chapter analyses the extent to which intercultural competency training, delivered by interfaith practitioners, enhances patient and staff experiences from minority faith communities in Israel, by way of improving their access to freedom of religion or belief as well as health outcomes. It examines the context in which this training is delivered and analyses the outcomes of interviews with those who have participated, including medical professionals and facilitators, of different faith backgrounds. Findings from these interviews show that training improves the ability of health workers to understand the religious needs of patients and how religious identity may inform patient concerns and choices, thus improving health-care provision

and health outcomes in turn. They also show how intercultural training challenged unconscious bias and improved staff relations between those of majority and minority faith backgrounds, enhancing the experience of the latter in the workplace, including protecting them from discrimination and hate on the grounds of religious difference.

**Keywords** cultural competence, interfaith relations, ethnic groups, Israel, minorities in Israel, religious literacy, health-care education.

**Freedom of Religion or Belief Integration for Sustainable Development in the Oyo State Local Government Scholarship Scheme, First Technical University, Ibadan, Nigeria**

Olumide Adebimpe Aderounmu

**Abstract** The Oyo State Local Government Scholarship Scheme (OYSLGSS) at the First Technical University, Ibadan is a development initiative of the state government. It is not an initiative intended to redress religious inequalities, however, its operations expectedly have religious implications that could trigger a religious crisis (if not well managed), which may not only hamper the scheme, but also adversely affect the peace, democracy, and holistic development of Oyo State and, by extension, its outer world. This chapter aims to deepen knowledge of how freedom of religion or belief (FoRB) has been managed in OYSLGSS operations by identifying areas of possible integration of FoRB or religious discrimination and inequalities within the scheme. It details findings of a study undertaken to determine factors responsible for religious inequality within the scholarship system and interrogate the development policy implications of the findings, along with providing appropriate recommendations for fairness and equity, effective policy management, and inclusive development practices in the area of higher education. Findings revealed that OYSLGSS operations had no formal document on religious considerations or any FoRB consciousness officially factored into the scheme. This is informed by alleged information hoarding on the scheme and religious favouritism regarding the nomination of candidates and selection of scholarship awardees. The outcome is that while the scheme is well represented by those awardees that belong to Islam and closely followed by those who belong to Christianity, there is no representation from those who belong to traditional religions. To promote FoRB for sustainable development, the OYSLGSS needs to create more inclusive participation as obtained for standard scholarship programmes by opening up the application to all eligible candidates through an institutionalised, accessible, and standardised process, which is based on merit and equity.

**Keywords** belief, religion, stakeholder, scheme, scholarship awardee, policy, sustainable development, discrimination, scholarship, conflict.

### **The Other Invisible Hand: How Freedom of Religion or Belief Fosters Pro-Social and Pro-Developmental Outcomes for the Poor**

Rebecca Supriya Shah and Timothy Samuel Shah

**Abstract** India is the world's largest democracy and an economic powerhouse. But it is also home to stubborn poverty and some of the world's worst religious persecution, particularly with the rise of a nationalism that adversely affects devoutly religious individuals from majority and minority religious traditions. Might India's relentless religious repression and stubborn poverty be related? Might an unshackling of the poor to break out of the social straitjackets imposed by caste and certain religious beliefs and practices unleash economic freedom and dynamism that could lift generations out of persistent poverty? This chapter demonstrates how the free exercise of religion or belief can enhance important features of human flourishing among the neediest members of the human family. Through the availability and exercise of religious freedom, the most vulnerable are empowered to exercise self-determination, becoming agents of change for the better, with the capability to create opportunities for themselves and their families.

**Keywords** development, religion, poverty, empowerment, caste, resilience, marginality.

### **PART 3: TENSIONS BETWEEN NATIONAL MODELS OF DEVELOPMENT, RELIGIOUS EQUALITY, AND RESPECT FOR FoRB**

#### **'We Put God and Drums in the Front': Spirituality as Strategy in an Adivasi Self-Empowerment Movement**

Philip Mader

**Abstract** This chapter examines the role of spirituality in struggles for self-empowerment and land, based on an evaluation of an empowerment programme for Adivasis in which spirituality plays a strategic enabling role. Many of India's indigenous Adivasi people have suffered land loss and are trapped in debt bondage. Asserting rights to land using legal instruments offers an escape. To enable this, the programme animates a reconnection with traditional spiritual practices, which not only motivate groups to claim rights but also help by distinguishing them as 'traditional' inhabitants of the forest and affording their activities protection from repression. Culture and spirituality therefore can have strategic value for empowerment when understood as both innate and malleable, and consciously directed towards attaining particular goals. These insights may be useful for other actors fostering vulnerable groups' empowerment, and they draw attention to the importance of freedom of religion and belief for Adivasis in contemporary India.

**Keywords** Adivasi, empowerment, spirituality, debt, bonded labour, land rights, agroecology, civil society, India.

## **Sustainable Faith and Livelihoods: Promoting Freedom of Religion or Belief in Development**

Rifqah Tifloen and Matome Makgoba

**Abstract** Coal development has been deeply contested and debated globally, and despite recognising its economic contribution in the country, there is still a disjuncture between its intended impact and the lived reality of many of South Africa's mining-affected communities. Although much has been written about coal mining developments in South Africa, there is little literature that examines the relationship between freedom of religion or belief (FoRB) and coal mining in South Africa. Engaging faith communities in Lephalale, this chapter seeks to explore the impact of land dispossession and mining-induced dispossession through the lens of FoRB and its intersection with other human rights. Based on the experiences of the faith communities in Lephalale who took part in the study, using an intersectional conceptual framing and cultural mapping, the chapter examines the struggles and opportunities for integrating FoRB into development programmes and refers to South Africa's Just Transition.

**Keywords** freedom of religion or belief, coal mining, development, culture, faith practices, ritual, religion, environment.

## **The Integration of Traditional Religious Beliefs in the Conservation of the Rwenzori Mountains National Park, Uganda: Processes, and Lessons Learned**

Moses Muhumuza, Tom Vanwing and Mark Kaahwa

**Abstract** This chapter focuses on a case study of the Rwenzori Mountains where a project was implemented in an attempt to integrate the traditional religious beliefs of the local people (the Bamba and Bakonjo) into the sustainable conservation of the Rwenzori Mountains National Park for the social and economic development of the people that depend on it. The Bamba Bakonjo people inhabit the Rwenzori Mountains in Western Uganda. Their traditional culture and belief system is closely linked to the Rwenzori Mountains. Since ancient times, these people have depended on the land, water, plants, and animals of the mountains for their livelihood and survival. However, when the Rwenzori Mountains National Park was established in 1991, local people in general and in particular, the Bamba and Bakonjo who are mountain inhabitants, were denied access to most resources in the park and were offered only restricted access to a few of the resources. This caused conflict between these people and the park staff, as the local inhabitants continued to access the park 'illegally'. Consequently, the Rwenzori Mountains National Park administration met with various problems in an attempt to enforce policies governing the conservation of biodiversity in the park. During a Culture, Values and Conservation Project, upon which this case study is based, it was found that the Bamba and Bakonjo have traditional rules and resource management structures, traditional knowledge and specialisation of resource extraction and usage, beliefs in gods and spirits, and totems associated with local people's culture, all of which were entrenched in a strong but weakly expressed traditional religious belief system. In this chapter, we demonstrate how the traditional

religious belief system was integrated into the management of the park, and the lessons learned by the local community and the Uganda Wildlife Authority staff.

**Keywords** beliefs, conservation, religious, Rwenzori, traditional.

## **PART 4: EXTERNAL ACTORS' PROMOTION OF FoRB: IDEOLOGY AND POLITICAL WILL**

### **International Assistance and Impoverished Religious Minorities in Pakistan**

Asif Aqeel and Mary Gill

**Abstract** Pakistan is striving towards poverty alleviation with international assistance, but without ensuring religious minorities are included in this process. The overwhelming number of religious minorities consist of Christians and scheduled-caste Hindus, who suffer extreme poverty, unemployment, illiteracy, landlessness, and the stigma of untouchability. They stand nowhere in the political and economic life of the country, and are sidelined by development programmes. The US\$256m World Bank-funded project implemented by the Pakistan Poverty Alleviation Fund (PPAF) from 2009 to 2016 claimed to have benefitted over 10 million Pakistanis, including marginalised women and people with disabilities. But it failed to include impoverished religious minorities, despite having promised to do so. For inclusive development, international aid agencies need to make implementing partners such as PPAF ensure participation of impoverished minorities in projects, requiring them to appoint adequate numbers of minorities on their own boards and to hire minority staff to be inclusive from within.

**Keywords** social exclusion, marginality, religious minorities, inequality, stigma, poverty, World Bank, residential segregation, caste, untouchables.

### **Promoting Freedom of Religion or Belief in a Poverty Reduction Programme in Sudan**

Manal Ahmed (Elehemier)

**Abstract** This chapter describes the Islamic Development Bank (IsDB) approach to freedom of religion or belief (FoRB) in its policies and practices during its development interventions in Sudan between 2016 and 2019. It focuses on the IsDB's attempts to integrate FoRB into its poverty reduction and development interventions in South Kordofan and Blue Nile states, the poorest states in the country, through the company's Islamic Microfinance (IM) initiative. Most of the population of the two states are either Christian, atheist or have their own indigenous religions and beliefs, groups who have faced grave repression, violence, and religious discrimination due to their beliefs by the Islamic government of Sudan. The IsDB's IM initiative has supported the government in implementing the Sudanese National Strategy for Poverty Reduction Programme, attempting to promote FoRB through equal access to microcredit, regardless of religious affiliation. The chapter

argues that promoting FoRB through IM interventions is still undermined by systematic repression, violence, and structural religious discrimination against minority populations.

**Keywords** poverty reduction, Islamic Microfinance, religion, freedom of religion or belief.

### **Freedom of Religion or Belief Blind Spots in Development and Peace-Building Theory and Practice**

Katharine Thane

**Abstract** This chapter presents connections, disconnects between, and opportunities to integrate freedom of religion or belief (FoRB), and key development and peace-building literature, approaches, and practice. FoRB relates to fundamental facets of human identity and motivation. Aspects of FoRB are sometimes implicitly touched on within development and peace-building spheres, but without direct engagement. Where FoRB is pursued, it tends to be in direct response to specific observed FoRB violations, framed as one of many aspects of a broader agenda. A FoRB lens supports the analysis of structural inequalities within societies, based on people's often (less visible and) overlooked religious or belief identities and related experiences. Existing 'blind spots' within development and peacebuilding spheres result in inadequate engagement with or understanding of all root causes and drivers of inequalities and subsequent violence at play. Deep listening to affected people in different contexts and between development, peace-building, and FoRB practitioners will help overcome these blind spots, and meet mutual goals.

**Keywords** freedom of religion or belief, human rights, development, peace-building, SDGs.

## **PART 5: CONCLUSION**

### **Way Forward**

Mariz Tadros

**Abstract** This chapter reflects on some of the overarching themes emerging from the different case studies presented in this book. It highlights ways in which freedom of religion or belief (FoRB) can be recast conceptually and in practice in order to redress religious inequalities. The chapter is divided into three main sections: broadening the meaning of FoRB; understanding religious inequalities in their intersections with other drivers of inequality; and embedding FoRB under other banners. Finally, it explores avenues for promoting religiously inclusive and diverse societies that achieve FoRB yet through unconventional framings and pathways.

**Keywords** freedom of religion or belief, religious inequalities, religious otherization, development, social change.

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All qualifiers all.

## List of abbreviations

<b>APPG</b>	All-Party Parliamentary Group
<b>BJP</b>	Bharatiya Janata Party [India]
<b>CC</b>	cultural competency
<b>CCF</b>	Community Capitals Framework
<b>CHIPS</b>	Christian International Peace Service [UK]
<b>CLJ</b>	Center for Law and Justice [Pakistan]
<b>CO</b>	community organisation
<b>CREID</b>	Coalition for Religious Equality and Inclusive Development [UK]
<b>CRISE</b>	Centre for Research on Inequality, Human Security and Ethnicity [UK]
<b>CSO</b>	civil society organisation
<b>CVCP</b>	Culture, Values, and Conservation project [Uganda]
<b>DCD</b>	Development Co-operation Directorate [France]
<b>DIHR</b>	Danish Institute for Human Rights
<b>DMCDD</b>	Danish Mission Council Development Department
<b>DMRE</b>	Department of Mineral Resources and Energy [South Africa]
<b>EIA</b>	Environmental Impact Assessment
<b>EOI</b>	expression of interest
<b>EU</b>	European Union [Belgium]
<b>F&amp;BF</b>	Faith & Belief Forum [UK]
<b>FBO</b>	faith-based organisations
<b>FCDO</b>	Foreign, Commonwealth & Development Office [UK]
<b>FFI</b>	Fauna & Flora International [UK]
<b>FGD</b>	focus group discussion
<b>FoRB</b>	freedom of religion or belief
<b>FRA</b>	Forest Rights Act [India]
<b>GDP</b>	gross domestic product
<b>GIGA</b>	German Institute of Global and Area Studies
<b>GSDRC</b>	Governance and Social Development Resource Centre [UK]
<b>HDI</b>	Human Development Index
<b>HIA</b>	Heritage Impact Assessment [South Africa]
<b>HRBA</b>	human rights-based approach
<b>ICC</b>	Interfaith Community Committee
<b>ICCPR</b>	International Covenant on Civil and Political Rights
<b>ICDC</b>	Interfaith Community Development Committee
<b>ICESCR</b>	International Covenant on Economic, Social and Cultural Rights
<b>IDS</b>	Institute of Development Studies [UK]
<b>IEP</b>	Institute for Economics and Peace [Australia]
<b>IFA</b>	Indian Forest Act [India]
<b>IM</b>	Islamic Microfinance
<b>IMFs</b>	Islamic Microfinance Firms
<b>IPPFoRB</b>	International Panel of Parliamentarians for FoRB [Norway]
<b>ISA</b>	International Studies Association [USA]
<b>IsDB</b>	Islamic Development Bank [Saudi Arabia]
<b>ISI</b>	International School Ibadan [Nigeria]
<b>ISIL</b>	Islamic State of Iraq and the Levant

**JAMB** Joint Admissions and Matriculation Board [Nigeria]  
**JISRA** Joint Initiative for Strategic Religious Action  
**JLIFLC** Joint Learning Initiative on Faith and Local Communities [USA]  
**JRU** Joint Reconciliation Unit [UK]  
**K4D** Knowledge, Evidence and Learning for Development  
**LCS** Living Conditions Survey [South Africa]  
**LGA** local government area  
**LIC** Local Interfaith Committee  
**LSO** local support organisation  
**MDG** Millennium Development Goal  
**MFI** microfinance institution  
**MoH** Ministry of Health [Israel]  
**MPRDA** Mineral and Petroleum Resources Development Act [South Africa]  
**NERDC** Nigerian Educational Research and Development Council [Nigeria]  
**NGO** non-governmental organisation  
**NHRA** National Heritage Resources Act [South Africa]  
**NPC** National Population Census  
**NREGA** National Rural Employment Guarantee Act [India]  
**NSWP** Global Network of Sex Work Projects  
**OECD** Organisation for Economic Co-operation and Development [France]  
**OHCHR** Office of the United Nations High Commissioner for Human Rights [Switzerland]  
**OYSLGSS** Oyo State Local Government Scholarship Scheme [Nigeria]  
**PaRD** International Partnership on Religion and Sustainable Development [Germany]  
**PCP** Primary Care Professional  
**PESA** Panchayats Extension to Scheduled Areas Act [India]  
**PMC** Park Management Committee  
**PO** partner organisation  
**PPAF** Pakistan Poverty Alleviation Fund  
**PTA** Parent Teacher Association  
**PWA** Plateau Will Arise  
**REEP** Religion and Economic Empowerment Project  
**RfP** Religions for Peace [USA]  
**SACC** South African Council of Churches  
**SAF** Sudanese Armed Forces  
**SAFCEI** Southern African Faith Communities' Environment Institute [South Africa]  
**SAFWCO** Sindh Agricultural Forestry Workers and Coordinating Organisation [Pakistan]  
**SAHRC** South African Human Rights Commission  
**SC** Scheduled Caste  
**SDG** Sustainable Development Goal  
**SEA** Strategic Environmental Assessment  
**SOGI** sexual orientation and gender identity  
**SPLA** Sudan People's Liberation Army  
**SPLM** Sudan People's Liberation Movement  
**SPLM-N** Sudan People's Liberation Movement–North  
**SR** Scriptural Reasoning

**ST** Scheduled Tribe  
**TAP** Transparency, Accountability and Participation Network [USA]  
**TTO** three-tier organisation  
**UC** union council [Pakistan]  
**UDHR** Universal Declaration of Human Rights  
**UN** United Nations [USA]  
**UNAMI** United Nations Assistance Mission for Iraq  
**UN CESCR** UN Committee on Economic, Social and Cultural Rights [Switzerland]  
**UNDESA** United Nations Department of Economic and Social Affairs [USA]  
**UNDG-HRWG** UN Development Group – Human Rights Working Group [USA]  
**UNDP** United Nations Development Programme [USA]  
**UNFCCC** United Nations Framework Convention on Climate Change  
**UNFPA** United Nations Population Fund [USA]  
**UNGA** United Nations General Assembly [USA]  
**UNHCR** United Nations High Commissioner for Refugees [Switzerland]  
**UNHRC** United Nations Human Rights Committee [Switzerland]  
**UNIATF** United Nations Interagency Task Force  
**UNICEF** United Nations Children’s Fund [USA]  
**UNITAD** Investigative Team to Promote Accountability for Crimes Committed by Da’esh/ISIL [USA]  
**UNU-WIDER** United Nations University World Institute for Development Economics Research [Finland]  
**UPA** United Progressive Alliance [India]  
**US** United States  
**USAID** United States Agency for International Development  
**USIP** United States Institute of Peace  
**UTME** Unified Tertiary Matriculation Examination [Nigeria]  
**UWA** Uganda Wildlife Authority  
**VO** village organisation  
**VUB** Vrije Universiteit Brussel [Belgium]

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## PART 1

### **Introduction**

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# Chapter 1

## **Redressing Religious Inequalities and Challenging Religious Otherization: Global Perspectives and Encounters\***

**Mariz Tadros<sup>1</sup>**

How can we make religious equality a reality for those on the margins of society and politics? This book is about the individual and collective struggles of the religiously marginalised to be recognised, and their inequalities, religious or otherwise, redressed. It is also about the efforts of civil society, governments, multilateral actors, and scholars to promote freedom of religion or belief (FoRB), whatever shape those efforts take. The actors and contexts that feature in this book are as diverse as health workers in Israel, local education authorities in Nigeria, indigenous movements in India, Uganda, or South Africa, and multilateral actors such as the Islamic Development Bank in Sudan and the World Bank in Pakistan.

Some of the case studies engage with development discourses and narratives or are undertaken by development actors, while other cases operate completely outside the international development paradigm. The common denominator is that they are informed by the praxis of seeking to redress religious inequalities, directly or indirectly, with varying levels of success and failure. A common factor across all the case studies is that they examine individual or community experiences and perceptions of religious inequality and how they intertwine with socioeconomic inequality. The approach is informed by grounded theory, premised on emerging theoretical insights from an understanding and analysis of the dynamics of power on the ground.

This introductory chapter is organised as follows. Section 1 briefly describes the rationale and overall approach underpinning this book. Section 2 highlights some of the conundrums associated with naming and framing FoRB and religious inequalities. Section 3 explores approaches that seek to redress religious otherization and exclusion in education, health, and economic inclusion policies. Section 4 highlights the tensions between national development policies and the rights of people on the margins whose violations are both of an economic and religio-cultural nature. Section 5 discusses the disconnects between rhetoric and practice in international multilateral agencies' engagement with religious pluralism in the contexts in which they operate. Section 6 concludes.

## 1 Rationale and approach

The chapters in this book seek to contribute to addressing a number of gaps in understanding experiences of ‘religious otherization’ (see discussion of this concept below) for people living in poverty. First, despite the wide array of tools and approaches available for measuring and monitoring FoRB in Western scholarship, there is still a deficit of literature presenting the granular understandings of the conditions and drivers of the unequal power relations experienced on the ground (Tadros and Sabates-Wheeler 2021). The second issue pertaining to the scholarship on FoRB is that the documentation and analysis of experiences of violations predominantly convey the analysis and interpretations of local and international elites. Many of the authors of these chapters were keen to understand and share the experiences of FoRB through the interpretive lens of those on the margins.

Third, the literature on the FoRB–development nexus is still limited, and we hope this book addresses this in several ways. Some chapters highlight the FoRB-blindness of narratives and practices of development in terms of ignoring, overlooking, or circumventing how forms of exclusion informed by religious inequalities undermine processes of positive change. Other chapters point to the exclusionary nature of national development policies and their devastating impact on religiously marginalised people. Other chapters point to the possibilities and tensions of integrating religious equality in national sectors such as education and health. Others point to the pitfalls of external development actors’ ‘interventions’ for inclusive development policies in countries where the targeting of religious minorities has created severe religious equality deficits.

Where do the realities of people experiencing intersecting inequalities on account of their religious or belief affiliations and socioeconomic exclusion fit with the Sustainable Development Goals’ (SDGs) mantra of ‘leave no one behind’? This book endeavours to deepen the conversation about the congruences and divergences between promoting inclusive development and religious equality. Development as a concept is deeply contentious, fraught with conundrums on its normative underpinnings, and the extent to which its post-colonialist genealogy continues to inform its transformative potential. The book situates religious equality in relation to global narratives around inclusive development as well as in relation to local conceptions of recognition and justice.

The idea of the case studies presented in this book emerged in a meeting of the advisory group of the Coalition for Religious Equality and Inclusive Development (CREID)<sup>2</sup> in 2019. CREID is a consortium convened by the author, who is based at the Institute of Development Studies, University of Sussex, to make poverty alleviation programming more aware of and responsive to the realities of people experiencing intertwining inequalities on the basis of religious affiliation, class, gender, geographic location, and other characteristics. The advisory group suggested that, in addition to the core countries in which CREID is undertaking Action Research, it would be very beneficial to broaden the scope of our inquiry to include the experiences and perspectives of a wide array of activists, professionals, practitioners, and scholars beyond the remit of the partnerships and projects with which we are cooperating.

After much deliberation and an iterative process of consulting with various stakeholders, an expression of interest (EOI) was published. The EOI that was issued revolved around two core questions which broadly comprise the parameters of this book: ‘How has FoRB been integrated in processes of redressing religious inequalities? To what extent was/is the attempt (of integrating FoRB) successful and why?’ The call was purposely broad in scope to allow applicants to approach the theme from any reality they are experiencing on the ground that involves an active promotion of FoRB or religious equality. We deliberately sought to broaden the inquiry beyond ‘success stories’ of promoting FoRB to include experiences of initiatives where the desired objectives were not met, or where the initiative yielded unintended outcomes, or where the initiative claimed to be inclusive but the evidence for the disconnects with reality on the ground suggested otherwise. We prioritised case studies from Africa, Asia, or the Middle East as these were the areas where CREID was operating, and therefore may be particularly useful for other partners in our programme.

The chapters in this book are, with the exception of a couple of entries, the outcome of this call. It may be worthwhile to reflect briefly on the process of issuing an EOI as a method of outreach and evidence generation. I have been reminded that important insights are often generated from what has not worked procedurally as much as what has come to fruition. There are several lessons learned of incongruencies between our expectations when we designated the EOI and the aspired outcome. The first setback was that we had hoped to receive submissions from the broadest set of actors possible that would include not only academics and practitioners but also journalists, local leaders, and activists, to mention but a few. Despite widely advertising the call among our partners in civil society, academia, and human rights, the pool of applicants was still fairly limited.

Upon reflection, we realised a number of uncomfortable truths about our EOI. The first is language. When a call is in English and the expected language of narration is English, this undeniably limits multivocality and engagement with non-Western narratives associated with how stories are told. The second issue had to do with outreach. There is a disconnect between actors on the ground who are in the midst of struggles to make daily realities more inclusive of religious minorities around the globe and the space in which CREID, convened by the Institute of Development Studies, as an academic institution based in the UK is situated. This is one of the realities of Western aid’s limited sphere of access and influence globally.

The third issue is one of framing. The terms ‘freedom of religion or belief’ or even ‘religious equality’ do not feature in the narratives of people experiencing religious otherization. Even when people on the ground are engaged in struggles with clear implications for religious inclusion, they rarely use the language of FoRB in their claims-making. This does not mean in any way that people do not strive to enjoy religious freedom or would not want to experience equality with peers of majority religions or no religions. Rather, as will be discussed below, people have very many different terms and ways of expressing their aspirations, visions, and yearnings for the fulfilment of this aspect of their lives. However, these struggles take the form of neither projects nor programmes.

Hence, the framing of our call as FoRB in relation to projects or programmes may have unintentionally compounded the exclusion of a myriad of endeavours for redressing religious inequalities. Quite expectedly, we did receive a number of applications by non-governmental organisations proposing they cover their own successful initiatives in terms of dialogues, conflict resolution, and peace-building. Where proposals read as if they were a public relations exercise in promoting the wonderfulness of an organisation, rather than the struggles and unpredictability of power dynamics, we politely turned them down.

Another set of incongruences between aspirations for case studies on FoRB and pathways of change emerged after case studies were commissioned. One of the most widely prevalent challenges was associated with defining what constitutes evidence. We encountered a major conundrum pertaining to initiatives being deemed successful if people of different faiths were brought into dialogue – without any indication of which, if any, power dynamics had shifted as a consequence. Interfaith dialogue has been fashionable in the peace-building and conflict resolution Western scholarship and policy arena (see Thane, this volume). Very rarely has the evidence been presented that links the dialogue with actual change on the ground. We faced such a case study on an initiative in Myanmar in which a dialogue between everyday Burmese Buddhist and Muslim and Christian women in late 2019 (prior to the coup) was described – and submitted as evidence in and of itself of FoRB being promoted.

There was no interrogation of how these encounters shifted the power dynamics in any way on the ground nor any interfaith collective action that may have followed as a consequence. These questions were left unanswered with the assumption that the very occurrence of a dialogue is evidence of FoRB being advanced. Undoubtedly, the politics of evidence in Western scholarship is deeply problematic in its simplistic focus on attribution; that is, narratives that attribute change solely to interventions when in reality there are a wide array of complex factors that can neither be planned nor orchestrated that influence change.<sup>3</sup>

However, there still remains the problematique of equating an interfaith dialogue with advances in FoRB or religious equality. Around the world, many of those experiencing religious inequalities scoff sceptically at the rhetoric of peace-loving religions rehearsed in interfaith dialogues at local, national, and international levels (see Tadros 2013 for an example from Egypt). They point to the failure of such dialogues to trickle down in any way that meaningfully shifts – even only slightly – the unequal power dynamics they experience in their lives. While noting that a dialogue or even a set of dialogues cannot be a panacea for systemic, sometimes decades', perhaps centuries' old histories of religious discrimination and prejudice, nonetheless, any ripple effects need to be accounted for that are sparked as a consequence of the dialogue.

Another major challenge experienced is in data collection and synthesis. We realised that for some cases, it is a tall order to expect non-researchers to generate qualitative and quantitative data without research accompaniment. This generated various conundrums pertaining to the politics of knowledge generation in relation to voice, credibility, and validity of the data. A number of unexpected factors – especially the Covid-19

pandemic unfolding – made data collection very challenging for partners, a predicament that affected anyone undertaking social science research during this period. In retrospect, if we are to truly pluralise the voices, perspectives, and experiences of those seeking to redress religious – and other – inequalities on the ground, we will need to rethink our outreach, our approach, and the limits of our own positionality as a Western-based research institution.

One of the key selection criteria for choosing the case studies in this volume is the positionality of the authors. Positionality is an anthropologic term referring not only to how people represent and position themselves but how they are perceived in the setting in which they undertake research. Ignoring positionality represents one of the greatest oversights in research (and work) more broadly in the area of FoRB. Researchers (as well as social justice advocates, practitioners, and policymakers) tend to assume that if they think of themselves as empathetic towards the ‘religious other’ and they assume a standpoint favourable to religious equality, that they will be perceived and treated as such by the religiously, socioeconomically marginalised.

In addition to the conventional inhibitions marginalised people experience, such as fear of outsiders and the potential risks of associating with them or that they may be informants, and so forth, there are ones specific to the sphere of FoRB. If the outsider is associated with the religion of the majority or the state who are complicit in religious homogenisation policies and practices, this undermines the credibility of the research process. Even if the outsider is a self-declared atheist or condemns the action of the perpetrator of discrimination that the group experiences, this does not necessarily erase perceptions of threat. In other words, the researcher does not even need to share the same background as the religious majority for their positionality to undermine their access to the community. In some situations, the researcher’s country of origin or their name being associated with a particular religious group could be enough to undermine their legitimacy. In other cases, images in circulation of the person in the company of those who are seen as oppressive or, without knowing, visiting a community in the company of someone who is considered a ‘traitor’ will detract from legitimacy.

The importance of being mindful of positionality, to be considered legitimate in the eyes of the subjects of the research, does not signify that all individuals from the majority religion from the same country or all outsiders will struggle to earn the trust of members of religiously marginalised groups. It does, however, affect the research process. For example, with respect to one case study commissioned for this volume, all the quantitative research was entirely discounted and rejected because it became very clear that participants were engaging with the researchers in a spirit of fear and were therefore giving consistently positive ‘exemplary’ answers to avoid any potential backlash.

On occasion, a member of a religiously marginalised group may not be confident to speak out about violations or injustices for fear of putting others’ lives at risk, and an outsider may be better placed to narrate events and actions which would otherwise have remained hidden. An example of this is the case of Philip Mader, an outsider in relation to land struggles led

by the Adivasis of India, where there would have been insurmountable risks for an insider to publish this work in his/her name (see below). However, with this exception, all the cases in this volume have been undertaken by academics and practitioners who are from the same national background and who have an in-depth understanding of the history, politics, and nuances of representation and positionality.

In view of the fact that the call for proposals was open to academics and practitioners pursuing whatever methodological approach they deemed appropriate, there is great variation in the case studies presented here. Some cases (Nigeria, Pakistan) used a mixed methods approach combining interviews and focus groups with questionnaires. None of the case studies involved the exclusive use of quantitative methods, suggesting that researchers are aware of the limitations of quantitative data that is not accompanied by the interpretive lens of the participants to render meaning to the numbers. This echoes the findings of research undertaken by Birdsall and Beaman (2020) who note that research exclusively reliant on quantitative data rarely allows for a nuanced and credible understanding of the drivers and dynamics of FoRB encroachments at hand.

Other methodological approaches informing case studies are ethnographic (Uganda, India – Shah and Shah, this volume, and Israel – Feldmann Kaye, this volume), representing granular descriptions of power dynamics, relations, and perceptions of those religiously marginalised but also the actors shaping their realities. The case studies from South Africa (Tifloen and Makgoba) and India (Mader) use what would be conventionally considered Action Research (see Burns, Howard and Ospina 2021) – the documentation of the intervention being carried out as it unfolds, rather than afterwards. Action Research involves the use of participatory methods whereby the participants shape the research design, the data collection, validation, dissemination and, most importantly, assume sufficient ownership over the data, such that they can use it themselves for representing their demands and agendas (*ibid.*). For example, in South Africa, researchers applied cultural mapping as a methodological tool to guide participants in mapping sacred sites, green spaces, and water sources (used for rituals) as a starting point for identifying sites that are of religious/cultural significance. The use of participatory mapping created a conversational entry point for the communities to identify hindrances or obstacles to faith practices based on their own experience and local knowledge.

The cases discussed in the previous paragraph involved mitigating against varying degrees of security risks and necessitated authors prioritising duty of care towards partners above other considerations. It was a sobering reminder of how contentious and dangerous it is for people to discuss FoRB in many contexts around the world. In all of the contexts, researchers/practitioners had to be exceptionally careful in how they approached the subject. In some cases, the redlines for what was viable and possible to engage with in relation to the topic at hand were well defined, no matter how harsh; in other cases, the redlines were blurred and ever-shifting, such that it was up to the activists/researchers to weigh up what was safe.

A most striking example was on research with the Adivasis, which was ridden with intimidation and terror in a context of extreme religious

inequality. Mader writes that during a research visit the team itself ‘witnessed an arson attack perpetrated by local elites against an Adivasi group’ (p129). The research team was eventually forced to flee, while three families’ huts were burnt to the ground, the residents losing their shelter and their belongings. In order to proceed with sharing the work while maintaining a duty of care towards partners on the ground, the identities of the social agents who were supporting the mobilisation of the Adivasis were concealed under the name The Programme and any implicating details concealed. This included both the location and the time frame for its exploration as well as the researchers who supported the inquiry. The risks were so high that in addition to a standard peer review, one of the world’s leading experts on indigenous movements in India was commissioned with ‘guessing’ the location of the inquiry as a litmus test for any giveaways. Only when the author was assured that it was not the correct location and the expert deemed there were no clues to indicate their whereabouts was the chapter deemed publishable.

Beyond these conundrums, incongruencies, and dilemmas that were encountered in the process, the case studies present some important insights, which, while highly relevant for their contexts, also draw out important insights for academics, practitioners, activists, and others who have an interest in redressing religious inequalities for socioeconomically marginalised populations.

## **2 Reclaiming the idea of FoRB in pursuit of religious equality**

While this book is framed in terms of the promotion of religious equality as an ideal, different terms are in circulation among the authors including religious freedom, FoRB, religious discrimination, and religious persecution. There is no consensus on the meaning of the term FoRB and this is reflected in wide variations in operational understanding of religious freedom (Fox 2016; Gatti *et al.* 2019; Marshall 2021). The concept of FoRB has been problematised for its genealogy, its political weaponisation by powerful states, and its incoherent uses (see section 3).

Historically, FoRB and international development have had very different genealogies. The field of FoRB has been the remit of religious lobbies, and some governments. The ideas on FoRB have been advanced through declarations, treaties, conferences and conventions, dialogues, and summits. FoRB, like other ideas, experiences ebbs and flows. There are efforts towards its institutionalisation in foreign policy through toolkits and courses, workshops and platforms, focal points and special envoys, and programmes with large budgets, among a number of governments and non-state actors right now (2020–21) (Barker, Bennett and Farr 2019). But undoubtedly too, the concept – and its practices – have come under scathing attack for its weaponisation in conflicts, the severe ‘credibility deficit’ of those promoting it, and its assumed tensions with other human rights such as the rights of women and LGBTQI+ people (see Tadros and Sabates-Wheeler 2020 and Petersen and Marshall 2018). FoRB remains siloed in the realm of foreign policy and some human rights circles.

While taking on board its problematic appropriations, nonetheless, as Decosimo (2018: 16) suggests: ‘That some concept has a history, even an ethically suspect history, does not by itself tell us that ongoing use of the

concept perpetuates that history.’ FoRB should not be relegated to the dustbin of history on account of its political capture, any more than women’s empowerment should be abandoned on account of its instrumentalisation to advance highly questionable political agendas (see below).

Many of the conceptions of FoRB in circulation in Western scholarship and grey literature draw on Article 18 of the Universal Declaration of Human Rights (UDHR) and the International Covenant on Civil and Political Rights (ICCPR) which encompasses ‘freedom of thought, conscience, religion or belief’ (Article 18.3) (see Thane, this volume). As noted in Tadros and Sabates-Wheeler (2020), there are advantages in using this term; namely, that it encompasses those who follow a religion, and those who do not. The word ‘belief’ can encompass a wide array of norms and values which people can conceive of as sacred even if they are not codified into a ‘religion’ *per se*. My reference to the concept of religious equality in relation to freedom of religion is informed by several factors.

First, there is always a fear that with the language of freedom to/freedom from, freedom is considered in relative rather than absolute terms. In other words, when religious minorities who suffer from extreme or systemic persecution of an acute nature suddenly enjoy a modicum of freedoms not previously enjoyed, then they may be expected by some to celebrate their freedom of religion. If, however, equality is the goal, then even when progress is achieved and duly celebrated for incremental change in their status and position, the ultimate aim of enjoying the same set of rights as others is not forgotten. Some may argue that equal citizenship is informed by the same notion, and this is true, yet people who are not bestowed with the status of citizenship such as displaced people and refugees may not be in a position to claim citizens’ rights to religious equality.

The second issue is that FoRB focuses on the situation of individuals and groups as disparate categories. In other words, we discuss FoRB violations experienced by group x or the right to enjoy FoRB for group y. What is sometimes lost in the language of FoRB are the relational dimensions of how different groups and components of society relate to each other. Religious equality on the other hand is relational, insofar as equality is about the relationship of status and position. Religious equality allows for an engagement with intra- and intergroup dynamics. Religious equality allows us to look at the spectrum of religious otherization happening in a given context.

Religious otherization here refers to both a process and an outcome. There is a process of religious otherization inherent in who is included/excluded and processes of establishing hierarchies of worth/value. By religious otherization, we mean more than having a different religion; it means where differences become the basis of identifying you as ‘the other’, as someone who is not ‘one of us’. With reference to the use of the term religious otherization in our context, it is reflective of a relationship of power, rather than a numerical status (Tadros 2020).

Trochmann’s (2021) discussion of the discursive power of the social construction of ‘the other’ is particularly useful here. The ‘other’ is not a static object; rather, s/he/they exists in a dynamic relationship in a majority/minority context in which the majority are not only in a position of power, but their power is entrenched through institutional relationships.

Otherization represents a relationship that is context-specific in the sense that a person may be otherized in one place at one point in time and may experience a very different set of relationships in another context. While the experiences of religious otherization exist along a spectrum of severity and are deeply contextual, one theory is that otherization is driven by a sense of threat by those engaging in otherization. Judith Butler concedes that the act of otherizing people is informed by a perception that they represent a threat, a threat to the power and interests of the majority.

However, not all individuals belonging to groups that are religiously otherized share the same experience. Trochmann (2021) argues that the process of otherization is fluid and dynamic because it is affected by the intersectionality of identities informing human relations. This intersectionality of human relations applies to both the person/group doing the otherization as well as those on the receiving end. The intersection of various identities (class, gender, background, political orientation, etc.) of the person doing the otherization may accentuate or diminish how they otherize someone on the basis of their belief or religious affiliation. Simultaneously, religious otherization experienced by a wealthy and highly esteemed man of a religious minority in one context would be different to the otherization experienced by a poor, female, informal worker belonging to a religious minority.

The third merit of relating to FoRB through the concept of religious equality is very much related to the second; namely, that religious inequality intersects with other inequalities along other axes, such as gender, class, ethnicity, location, political orientation, and so forth.

Another rationale for thinking of FoRB along the lines of religious equality is of a pragmatic nature. For example, for those working in the area of international development, the language of equality brings in the relational dimension of religious equality in relation to other axes of equality/inequality. There is substantial discomfort among some development policymakers and practitioners with the concept of FoRB on account of its genealogy: being criticised for its Westcentricism and divisive historical applications (Petersen and Marshall 2018; Ferrara 2016.). As noted in the chapters by Thane, and Shah and Shah, FoRB remains a foreign concept to many working within development and peace-building spheres (even when a human rights lens is applied).

It is important to note, however, that neither FoRB nor religious equality feature in the narratives of the religiously marginalised whose lives are described in the chapters of this book. For many individuals and groups who have experienced systemic discrimination for a long duration, the default operation mode is not to talk openly about religious inequalities, discrimination, or targeting (see Feldmann Kaye's chapter on the health sector in Israel, this volume). Years of systemic discrimination have led to individuals and communities internalising a sense of fear of being punished for challenging the status quo. Moreover, as Tifloen and Makgoba share in their chapter in the context of South Africa, people were mobilising for their political and economic rights but were not specifically rallying behind claiming FoRB rights because they were not aware that legally they had the right to FoRB.

One of the key findings from the various studies is that there is a major disconnect between how religion features in people's lives in terms of how they exercise their 'religious' agency and the conventional conceptions informing frameworks of FoRB. The case studies illuminate three powerful insights. Shah and Shah's case study of the exercise of religious agency among poor women in India reveals that syncretism does not only feature in their conceptions of spirituality but also in their everyday survival strategies. Shah and Shah's chapter makes a compelling argument that the language of 'belief', 'affiliation', and 'belonging' is deeply problematic because it assumes that people's religious agency is always restricted to one religion.

The authors give the example of some of the women they interviewed who 'believed' in the power of Saint Anthony to heal their sick children but 'belonged' to the Hindu faith. They note that a Hindu woman may self-identify as a Hindu but regularly pray at St Mary's Catholic Church and also attend the fasting and prayer meetings at the local Pentecostal church. She may be simultaneously committed to praying to Christ and the Virgin Mary, but also continue to go to the Hindu temple once a month. Here the syncretic expression of religion in her life is not only informed by a mix and match of different religious and cultural norms and ideas but also by how they interface with the person's coping mechanisms. Where a person is sick, they will engage with the spiritual signifier that is associated with healing or economic blessing and so forth. It would be erroneous to interpret this as sheer pragmatism; it is also about emotional connections with different aspects of spiritualities that are both deeply subjective as well as shaped by the milieu in which a person has been raised.

The chapters on Uganda, South Africa, and India (Adivasis) that specifically engage with indigenous movements also challenge some of the assumptions of what FoRB entails and what its violations look like. While many understand freedom to worship in terms of the liberty to go to a physical building, these chapters indicate the importance of the understanding of ancestral grounds as being sites of worship. Whereas FoRB can sometimes focus on freedom to read and share scriptures, these case studies show the deep spirituality associated with practices in nature; in particular, for many groups, this involves land and water.

### **3 Religious inequalities in education, health, and economic wellbeing**

This section highlights ways in which FoRB-blind development policies can exacerbate perceptions of religious discrimination (Nigeria) and bring to the fore religious and cultural inequalities (Israel) or compound the effects of existing marginalisation (India).

The first chapter in this volume, written by Miriam Feldmann Kaye, focuses on a case study involving the use of intercultural dialogue to understand how to further diversity in a hospital setting in Israel, and provides insights into differential experiences of health care on the basis of religious and cultural background. The study was undertaken prior to the outbreak of the war between Israel and Gaza in May 2020.

The study objective was to understand how it is that despite the religious and cultural diversity of the health-care workers and patient populations,

and recognition of cultural competencies as crucial for good health-care provision in Israel, research on the quality of health care has ignored the question of religious inequalities among groups and FoRB issues more broadly. Feldmann Kaye observes that,

even though the hospital management is aware of the need to enhance CC [cultural competency] within their institutions, religion as a component of CC is perceived as relatively unimportant. Indeed, it suggests that religion and religious diversity is poorly integrated into mainstream notions of CC.  
(Feldmann Kaye, this volume, p33)

The author notes that initially cultural competency covers language diversity and some understandings of religious literacy but in a marginal manner.

Religious inequalities in health care need to be understood and redressed. Clearly, when religious inequalities exist, they undermine the principle of equitable access to health care. SDG 3 is about the promotion of wellbeing for all; however, if patients experience religious bias at the hands of health workers and the health system in general, this represents a denial of their right to adequate access to, and experience of, the right to health care and affects the realisation of the notion of promotion of wellbeing for all. By the same token, health workers can also suffer from experiencing religious prejudice by patients and society at large. Target 3c of SDG 3 is to ‘substantially increase health financing and the recruitment, development, training and retention of the health workforce in developing countries’ (UN n.d.).

Feldmann Kaye’s case study shows the importance of addressing inequalities within the health workforce more broadly. The author presents an intervention involving bringing together health professionals from Jewish and Muslim backgrounds in Israeli hospitals. Health workers from Jewish and Muslim backgrounds engaged in a range of activities collaboratively to reflect on their experiences and those of their patients in relation to how prejudice affects health care. This was a process extending over several sessions, encouraging health professions of largely Israeli Jewish and Palestinian Muslim backgrounds to share their experiences of working in the health sector (one of the limitations highlighted by the author is the absence of other religious groups such as the Christians and Druze). The dialogues enabled a positive impact on FoRB insofar as Palestinians reported that colleagues were now more willing to cover them during *iftar* (breaking fast during Ramadan) and hospital management reconsidered having all night shifts covered by Palestinian Muslims during Ramadan when *sohour* (eating before starting the fast, usually happening at dawn) meant that many Palestinian Muslims would be gathering for *sohour* in preparation for fasting the next day.

The strength of the process of bringing health workers from different faiths for an intercultural, inter-religious engagement is that it represents a form of ‘diapraxy’ or ‘diapraxis’. Diapraxis is a term that does not mean ‘the actual application of dialogue but rather dialogue as action’ (Rasmussen 1988: 3). Diapraxis, a term coined by Lissi Rasmussen, is intended to be a

form of dialogic action that participants of different backgrounds take part in because of their vested interest in transforming a concrete issue that they are experiencing jointly on the ground (Rasmussen 1988). This is in stark contrast to how high-level interfaith dialogues between faith leaders often materialise. Often senior religious figures (mostly men) from different faiths convene to develop common declarations around peace, fraternity, and commitment to diversity. There are very few studies that document the evidence of how these high-level interfaith dialogues affect the religiously marginalised groups outside the conference halls the meetings are being held (Tadros 2020). On the other hand, with the kind of diapraxy that unfolded in the hospital, new forms of solidarity emerged between Arab nurses and their Jewish counterparts. The latter became aware of Arab nurses' experiences with patients who did not want to be served by Arabs, and consequently, they intervened more proactively with these patients in support of their Arab colleagues.

However, while diapraxy represents an opportunity to create a common response between people of different faiths around a common problem, it still cannot escape the power dynamics that shape religious inequality intertwining with other political inequalities. For example, there prevailed other forms of inequalities such as some of the Palestinian nurses reporting that they do not feel comfortable speaking in Arabic during their shifts, which is clearly a linguistic form of discrimination associated with their ethnic identity, as others who spoke in other languages such as Russian did not report feeling the same way. Raising this in the context of a safe space allowed Palestinian nurses to share experiences that they may have been too scared to disclose in other contexts.

However, as with all measures intended to promote FoRB, Feldmann Kaye acknowledges that these dialogues in and of themselves are not enough to deal with broader power dynamics – the elephant in the room is obviously the Arab–Israeli conflict. A decision was made by participants to avoid engaging with such a contentious and emotive issue, but evidently, this broader context does affect lives in very deep ways. The dilemma is articulated as attempting to conceive of health as 'neutral' ground where all efforts are focused on saving lives. However, sometimes it is impossible to ignore the power dynamics that shape relations in health care, and as one respondent said, not being satisfied with 'pretend friendships' (Feldmann Kaye, this volume, p41). What becomes clear is that ethnicity, religion, political affiliation, and language cannot be addressed separately in distinct siloes. This further confirms the importance of an intersectional approach that takes people's experiences – not the defence of religious doctrine – as its entry point.

Aderounmu's study shows how a developmental intervention which has the potential for positive development outcomes can backfire when the deep religious and ethnic fault lines on the ground are not taken into account. The development intervention is the instatement of a scholarship scheme to improve the opportunities of students to acquire a university education. The positive returns of education have long been established in development policymaking, as is evident in SDG 4. The Oyo State Local Government Scholarship Scheme (OYSLGSS) was established by the government to provide students with scholarships to enrol at the First

Technical University, Ibadan in the state of Oyo in southwest Nigeria. The initiative, notes Aderounmu, is the first full scholarship scheme to involve all local governments in the state to 'mandatorily sponsor at least five students to attend the university. Required funds are pooled from the local governments for upfront remittance to the university' (p72).

There is a copious amount of literature in development studies that shows that without due regard for the prevalent power dynamics on the ground, even the best-intentioned and well-designed initiative can have a boomerang effect, causing unintended negative consequences. Aderounmu shows that across Oyo State there has been a history of ethnic and religious tensions, which have entrenched deeply seated religious fault lines, in particular between the Muslim majority and the largest religious minority, the Christians, and vice versa in some local government areas of the state.

These realities were not taken into account when considering that the conditions of selecting candidates in the scholarship scheme are fair, accessible, and consistently applied. Consequently, the scholarship scheme was rendered vulnerable to perceptions of inequity and foul play. Muslim and Christian political leaders were able to share the information about the scheme with their followers, and there was no institutional mechanism at any level of governance to ensure that the minority who follow traditional (non-Muslim or non-Christian) religions also had access to information. This may have been a contributing factor as to why there were no scholarship grantees from those who follow traditional religions.

Development policies that are blind to religious inequalities are analogous in their impact on gender-blind development policies. Gender-blind development policies have been critiqued on the basis of their misguided assumption that if a development programme does not prohibit women's participation, then it is by default non-discriminatory, whereas research has shown how the absence of a level playing field makes gender-blind policies biased in their outlook towards women (by way of example, see Doss 2014; Baruah 2011). Similarly, in this case, lack of due consideration for how majoritarian dynamics influences access to resources has led to disconnects between proclaimed openness for all and the ability of religious minorities, in particular those on the margins, to have access to knowledge about the presence of the scheme in the first place. In contexts of religious majoritarianism, equitable governance of development resources necessitates that access to information about resources takes into account the likelihood that the religiously marginalised will not be accorded a level playing field when they are excluded from access to information.

Just as absence of developmental resources can be a curse, so can the presence of developmental assets if weaponised to foment religious strife and competition. In contexts where there is competition between politicians who weaponise religion for their political ends, any perception of access to resources being tied to religious and political loyalties will breathe fire into sectarian sentiment. Aderounmu's study showed that 'upon interrogation, some opined that information on the scheme may be deliberately gagged to restrict it to either political loyalists or loved ones, which could include religious colleagues of those that had the information' (p67). Avoidance of elite capture in development interventions in contexts of religious

majoritarianism necessitates that measures are in place to ensure that inter- and intragroup inequalities are taken into account in outreach plans.

The key issue that Aderounmu's chapter raises is that when it comes to ensuring FoRB-sensitive development, the devil is in the detail. The qualifying steps for eligibility for applying for a scholarship seemed to be on at least two levels, to be fair and equitable among those applicants who came to know about and apply for the scheme. The study suggested that 'the conduct of the ranking examinations by the university has been of a standard quality devoid of any religious discrimination' (p72) and moreover, the procedure and content of the examinations for eligibility for applying for a scholarship were fair and were perceived as such by the participants in the survey that Aderounmu undertook.

However, the disconnect between the perceived fairness of the application process and the selection process shows the centrality of transparency for mitigating against the exacerbation of religious hostilities. While the exam process was highly commended, on the other hand, the study showed that 'the examination scores were never published and determination of the final list of successful candidates was not sufficiently transparent' (p73). When a candidate from a religious minority (Christian) is congratulated for passing an examination but then finds out that a place was given to another candidate from a majority religion (Islam) in a particular local government, this creates an environment of mistrust and allows rumours of the privileging of one candidate over another on the basis of their religious affiliation to thrive. The outcome is that a programme that is intended to enhance educational inclusion for students becomes tainted with being exclusionary on religious grounds.

Aderounmu warns of the potential dangers of perceptions of injustice in distribution of development resources (in this case, scholarships) on social cohesion. Whether foul play occurred in all or some of the cases of scholarship granting, the lack of transparency in the sharing of the method of selection, and the lack of accountability for any incongruencies in the delivery of merit-based distribution of scholarship both negatively impacted on social cohesion at a local government level. The evidence of the fuelling of pre-existing animosities is clear: petitions are being drawn of foul play and sentiments (and rumours) are being diffused on resources being assigned not on meritocracy but on religious affiliation.

Aderounmu's study shows concern over its impact on democracy at large. Disputes over fairness of resources are a microcosm of disputes in Nigeria over the nature of democracy. Ultimately, it exposes the relationship between FoRB violations, religious inequalities, and exclusionary democracy. When democracy is understood to be a legitimisation of religious majoritarianism, then ultimately it can only be exclusionary and discriminatory towards those that hold alternative religious beliefs or none. An inclusive educational policy would ultimately require not only the instatement of a merit-based system of assigning scholarships but also addressing inequalities on a level playing field so that those on the margins are able to benefit.

Shah and Shah's chapter sheds light on another dimension of the relationship between development and FoRB and inequalities, namely the right to express religious agency freely and how it affects economic

wellbeing. Shah and Shah undertook their empirical research on the economic wellbeing of poor Dalit women during the Covid-19 pandemic, a period in which they documented the increased vulnerability of the socioeconomically marginalised to hardship, exploitation, and further impoverishment. Drawing on case studies, they show in detail how, focusing on both geographical location and background, Dalit women who exercised their religious repertoires experientially were also more likely to seek plurality in their economic repertoires for survival.

Beyond the specific case of Dalit women worshipping the goddess Yellamma, Shah and Shah suggest a probabilistic relationship between those who enjoy personally and experientially a relationship with the transcendent, and their confidence to venture in exploring what their options are for interest rates offered by different money lenders. Shah and Shah note that since an individual's adaptive capability is formed and strengthened during periods where there are no emergencies, during these times individuals can diversify their risk profiles, build resilience, and reduce vulnerability to extreme events by identifying lenders who are able and willing to provide loans at a competitive rate. In the context where systemic discrimination on account of caste, class, geographic location, and religion are acute, these findings have major significance for those that are committed to promoting wellbeing.

The key finding here is that the protection of poor people's freedom to engage in whatever religious practice they wish to, without hindrance or fear, is key to enabling them to cope with life's unpredictability and volatility. Such freedom is under assault in parts of Karnataka and Andhra Pradesh where the worship of the goddess Yellamma is under threat. Shah and Shah explain that while these Dalit women may 'identify' as Hindu, their practice of worshipping Yellamma includes forms of devotion that are despised by the Hindutva nationalists:

Devotion to the goddess, whose rituals include regular animal sacrifices and, in some cases, worship in the nude, does not sit well with Hindu religious leaders, including those who have been influenced by *Hindutva* teachings. These leaders have now engaged in efforts to revise the structure, beliefs, and practices of this ancient multifaceted faith, and infuse them with a political and nationalistic emphasis. In short, these reformers wish to create a 'sanitised' version of Hinduism that scrubs out of existence and recognition the worship of deities such as Yellamma, which is regarded as superstitious and ignorant.

(Shah and Shah, this volume, p97)

This straitjacketing of poor people's religious agency has major implications for inclusive development. First, any understanding of wellbeing needs to take into account poor people's recourse to religious repertoires as an intrinsic resource that plays a central role in their lives. Second, interventions that seek to understand and challenge class- and caste-based forms of assault on Dalits need to take into account how attempts at religious homogenisation by the Hindutva elites represent a form of epistemic violence against the Dalits' religious agency. In other

words, despising poor people's expressions of faith is part and parcel of the elites' assault on poor people's repertoires of power and sustenance. Third, encroaching on people's religious agency may lead to ghettoisation. Shah and Shah express concern that in response to being targeted, marginalised people may resort to a kind of religious sorting, akin to racial sorting among African Americans in the United States. Such a sorting would mean that people would associate only with those who hold the same beliefs, thereby blocking access to important networks, knowledge, and interactions with the broader community.

#### **4 Tensions between national models of development, religious equality, and respect for FoRB**

There is a rich and nuanced scholarship on how extractive and reductionist understandings and practices of development can strip people of their humanity and their political, economic, social, and cultural rights. The three case studies discussed below are examples of how national development policies can simultaneously deny people of their FoRB and their right to religious equality.

In India, the government proclaims a firm commitment to implementing the SDGs and a 'leave no Indian behind' agenda. However, in the name of economic development, it has also time and again evicted the Adivasis, an indigenous people traditionally living on forest land. Concurrently, Narendra Modi's government is promoting an exclusionary version of Hindutva ideology that is intolerant to all those who deviate from the narrow conception of what constitutes authentic Hinduism. Adivasis find themselves both held in bondage by landowning caste groups because of their historic loss of land while also being subjected to pressure to tow the Hindu nationalist line.

Mader's chapter suggests that Adivasis' struggle for the preservation of tribal land through agroecology is also a struggle for the protection of the cultural and spiritual repertoires of their community. The Adivasis' struggle is not framed in terms of FoRB (a term they do not use, see Mader) and they do not deny the transcendental in their defence of their right to the land. Mader notes that the distinctness of their identity makes them keen to differentiate their struggle from that of other groups, even from those who experience similar injustices. The intersection of economic and religious injustices is similar to other groups, for example, those of the Scheduled Castes who belong to religious minorities, or has resonance with the struggle of Muslim pastoralists. Nevertheless, the Adivasis engage in a distinct struggle which is situated in their history as an indigenous movement.

There is also a political imperative as to why framing their struggle on their own terms is crucial, rather than as part of other groups' quest for justice: while solidarity with other groups may bring the power of numbers, it means sharing in the political costs of being targeted by the state. Mader notes that,

Visible displays of Adivasi culture and spirituality furthermore usefully help to distinguish The Programme's activities from those of the staunchly secular Naxalite Maoist insurgency, which the

Indian government violently suppresses. Hence, as members of The Programme put it, they reduce the risk of persecution and increase their agency when, instead of chanting political slogans and invoking armed resistance, they put 'god and drums in the front'. (Mader, this volume, p116)

In South Africa, the government has pursued an extractive developmental model, allowing coal-mining enterprises who have purchased the land owned by the residents in Steenbokpan to change the mode of production from an agricultural hub into coal mining. The majority of the people of Steenbokpan identify with Christianity that is blended with African traditional belief systems. As their access to their ancestral land comes under coal-mining administration, the latter failed to understand that what the people lost was not just material resources, but immaterial, in terms of an assault on their spirituality. When actors are driven by maximising profit, the result can be not only the impoverishment of populations but also the violation of people's right to freedom of worship and association:

Participants also mapped places of worship including gravesites that represent sacred places and discussed access to these sites. Some of the graves are located within the Medupi Power Station campus and access is gained through requests and appointments that are granted sometimes, and the presence of armed security personnel creates a hostile environment. (Tifloen and Makgoba, this volume, p159)

Tifloen and Makgoba note that,

The removal of ancestral graves during the development of Medupi Power Station in Lephalale in the province of Limpopo drew outrage from faith communities and civil society who regarded the process as a violation of people's human rights, and shines a light on the contested nature of the development of South Africa's coal industry. (Tifloen and Makgoba, this volume, p145)

By restricting residents' access to ancestral lands where the burial sites represented an intergenerational spiritual connection between the living and the dead, they were being denied access to what they considered as sacred.

While noting the economic and environmental destruction brought about by the activities of the mining companies, this had another significant impact on their FoRB: the environmental degradation also meant a drying up of water, thereby denying them their ability to worship – water is used for 'baptisms by Christian congregants, cleansing, and healing by African traditional healers' (Tifloen and Makgoba, this volume, p158).

Here the principal violator of FoRB is a private sector actor, the mining industry:

In South Africa, over the past few years, there has been an increase in resistance to mining development from workers, trade unions,

small-scale farmers, civil society, and environmental activists due to health concerns, low wages or limited job prospects for locals, poor living conditions, inadequate community consultation, and a lack of accountability within the sector.

(Tifloen and Makgoba, this volume, p147)

There is a gap in research in relation to the role of private sector actors in promoting or undermining FoRB. Tifloen and Makgoba argue that the South African government is accountable for enabling the mining companies to create this hostile environment, as recognised by the South African Human Rights Commission's (SAHRC) report which 'found that the government was responsible for the harm done to mining-affected communities because of its "failure to monitor compliance, poor enforcement, and a severe lack of coordination"' (p147).

As with the Adivasis, the struggle has been framed in terms of the defence of people's cultural rights, as opposed to FoRB *per se*. In mobilising to preserve people's cultural and religious sites (and their associated way of life) under threat, activists sought to hold to account the state and mining companies by holding them in violation of the National Heritage Resources Act No. 25 of 1999 (NHRA). While the Act leaves much to be desired in terms of explicit and broad recognition of religious norms and beliefs as part and parcel of people's heritage resources, nonetheless, it was the entry point that at least provided a platform for galvanising the community. In reflecting on why the campaign was pursued in the name of heritage preservation, as opposed to defence of FoRB, the authors note that participants were aware of the Heritage Act but were not aware of the legal provisions pertaining to FoRB.

Interestingly, key references on FoRB in South Africa, such as the Office of International Religious Freedom at the US Department of State (2020), never mention mining companies as an actor responsible for the violation of FoRB, nor do they refer to indigenous people's struggles for access to their ancestral lands that they hold sacred. It seems that when advocates do not frame their struggles as for FoRB or against religious discrimination or any of its corollaries, Western analysts are less likely to consider it as such. Such oversight can have two implications: first, the myriad ways in which religious discrimination occurs are not recognised, and second, violators are not held accountable and go under the radar internationally.

In Uganda too, Muhumuza, Vanwing and Kaahwa present another example where development can be anathema to the protection of indigenous people's right to sacred land and practices. Ironically, the encroachment on indigenous people is occurring because of a policy that is intended to promote sustainable development. When the Rwenzori Mountains were gazetted as a natural park, to be managed by the government, powerholders did not consult the local people who were present in the area. Government authorities enforced several regulations that forbade the indigenous people living in the mountain access to particular territories containing religious shrines, and they also forbade resource harvesting as well as other activities associated with religious norms and beliefs. Muhumuza *et al.* argue that prejudiced attitudes towards the indigenous people had fed into the belief that they were responsible for destroying the flora and fauna.

It is not surprising that local people in the villages that neighbour the Rwenzori Mountains National Park reported that they felt that the Uganda Wildlife Authority staff considered them to be less important than the monkeys and apes that lived in the park. It is a classic case of what Timothy Mitchell (2002) would consider to be ‘the rule of the experts’, those assumed to have privileged knowledge and a lofty plan who are assumed to be best positioned to engineer change that is assumed to be in the interests of all. The chapter demonstrates powerfully how, when forced to listen to the people living in the Rwenzori Mountains, the ‘experts’ discovered that not only were the assumed tensions between the religious and heritage practices of the indigenous people and the protection of the environment premised on myth and not reality, but also that some of the religious and customary knowledge, rules, beliefs, and practices are conducive to the protection of the biodiversity and integrity of the habitat.

The role of the religious norms/beliefs in protecting the biodiversity of the Rwenzori Mountains can be seen, for example, in the worship of certain trees, in the belief that ‘if such trees were cut, they would bleed or cry or speak with an expression of pain’ (Muhumuza *et al.*, this volume, p190). As a consequence, areas where the Bamba and Bakonjo people were able to practise their religious beliefs were sites that enjoyed a greater diversity of plants and animals than some of the neighbouring areas where they did not reside. This is because the practices associated with the protection of nature allowed for the preservation of the flora and fauna because they were considered sacred. In other words, these norms were life-sustaining not only in the spiritual sense but in the environmental sense as well: the two were strongly intertwined.

Muhumuza *et al.* note that an attempt to address infringements on the cultural and religious rights of the local Bamba and Bakonjo people who were being violated by the authorities overseeing the Rwenzori Mountains National Park was made through the Culture, Values and Conservation Project (CVCP). This initiative jointly implemented by the Uganda Wildlife Authority (UWA) and Fauna & Flora International (FFI) sought to address the conflict between the rangers concerned for preservation of flora and fauna and local people’s persistence in accessing the area for religio-cultural practices. Once again, as with the Adivasis in India and the struggle over ancestral lands in South Africa, these struggles were made in the name of heritage preservation rather than the defence of FoRB. The convergence of what constitutes ‘religious’ and what is ‘cultural heritage’ is opaque, but it seems that the language of ‘cultural conservation’ had more political currency than FoRB protection.

### **5 External actors’ promotion of FoRB: ideology and political will**

There are two chapters in this book which explore attempts at making poverty reduction programmes funded by multilateral aid agencies more inclusive of religious minorities, one in Sudan and one in Pakistan.

The case of the World Bank’s Pakistan Poverty Alleviation Fund (PPAF) is highly compelling because of its size (US\$256m over five years, 2009–16) and outreach: it claimed to have benefited over 10 million Pakistanis, including marginalised women and people with disabilities. The authors of the chapter, Asif Aqeel and Mary Gill, were keen to assess

how inclusive the World Bank's outreach is with respect to its proclaimed commitment to also being inclusive towards religious minorities. The World Bank recognises religious minorities as comprising individuals and communities whose ranks in turn comprise some of the ultra-poor. In the case of Pakistan, the Hindus from Scheduled Castes and the Dalit Christians experience numerous intersecting sources of inequality on the basis of religious marginality, class, and caste.

The authors did not have access to the database of beneficiaries of the entire programme which would have enabled them to take a random sample and explore the scope of outreach among the religiously marginalised poor and the quality of their participation. Accordingly, Aqeel and Gill chose to take a more purposive approach to the inquiry, focusing on capturing the perceptions of marginalised groups of the World Bank programme. The focus groups and interviews undertaken in several districts were highly illuminating in understanding the World Bank's PPAF through the eyes of religiously marginalised poor people.

A widely cited proverb is that 'where there is a will, there is a way'. The evaluation of the World Bank's outreach on the PPAF showed that where those presiding over the programme willed for the inclusion of those who have historically suffered systemic inequality, there was relative success in reaching them. The authors concluded that within the remit of their inquiry, the World Bank's proactive efforts to include poor women and people with disabilities paid off. While the inquiry was not on the quality of participation or impact, it showed that the World Bank was able to at least ensure that those on the margins, on account of gender and ability bias, were included.

Not so for religious minorities. The authors identified a number of 'disconnects' at the design level which compromised the potential for outreach to the religiously marginalised ultra-poor. The first obstacle to outreach to the religiously marginalised ultra-poor is whether the geographic locations in which they live are included in the list of sites of high-priority outreach in the programme. If there is extreme disparity in socioeconomic conditions in an area where the religious majority are faring better than the religious minority, the latter can easily fall off the radar of the high-priority outreach districts. The authors note that some of the poorest Christians who live in ghettos in Punjab, as well as Scheduled Caste Hindus who are mostly bonded field labourers in rural areas of Sindh, were overlooked. In both instances, since the Muslims in these districts fared better, and they were a majority, those on the margins were overlooked. A more proactive approach that actively sought the pockets of the ultra-poor within districts would have enabled an outreach to these religious minorities.

The second factor from the authors' assessment of the inadequate inclusion of the religiously marginalised poor in the programme is associated with the privileging of areas where the World Bank previously worked. The authors note that, with the exception of one district, Sanghar, by and large there was a perpetuation of pre-existing bias in the selection of areas where PPAF was previously in operation and where religious minorities had already been excluded. The authors point to the fact that from focus group discussions, it became clear that most of the union councils (UCs)

selected for the implementation were the same where the PPAF conducted earlier projects.

The inference that the authors draw is that religious minorities were neglected in earlier projects and so were they in this project, despite the fact that the proposal design had made their inclusion as beneficiaries mandatory. They note that had the programme actively sought the inclusion of religious minorities, many of the adjacent or nearby UCs could have participated. This is akin to the incumbency factor in politics, whereby a politician who has been in office has significant advantage when seeking re-election over a candidate who is freshly competing. Here we see a similar phenomenon: the World Bank is drawing on pre-existing relations with UCs that have already been supported to expand and consolidate, thereby making it difficult for religious minorities to be represented where they were previously absent.

What accounts for these disconnects? Without an engaged conversation with those active on the programme, we are left with pure conjecture. There is of course the potential for what Wilkinson has explored at length in terms of internalised bias that shapes the lens through which contentious issues of religion are addressed (Wilkinson 2020). For Aqeel and Gill, the disconnect between the proclaimed intention of being inclusive of religious minorities living in extreme poverty and the reality on the ground becomes clear when compared with efforts to include extremely marginalised women and people with disabilities. They found that at the design, implementation, and monitoring phases, there were no deliberate efforts to redress the inequalities that have led to the exclusion of religious minorities from poverty programmes, whereas for women and people with disabilities, they fared a little better, featuring not only as participants but as representatives on local councils – because measures were proactively taken every step of the way to remove obstacles to their inclusion.

The chapter by Ahmed (Elehemier) describes the Islamic Development Bank's (IsDB) approach to promoting FoRB in its policies and practices during its development interventions in Sudan between 2016 and 2019. It focuses on,

the IsDB's attempts to integrate FoRB into its poverty reduction and development interventions in South Kordofan and Blue Nile states, the poorest states in the country, through the company's Islamic Microfinance (IM) initiative. Most of the population of the two states are either Christian, atheist or have their own indigenous religions and beliefs, groups who have faced grave repression, violence, and religious discrimination due to their beliefs by the Islamic government of Sudan. (Ahmed (Elehemier), this volume, pxiv)

The onset of the Covid-19 pandemic brought obstacles to undertaking a robust evaluation of the multi-tiered programme which included interfaith dialogues and peace-building activities, so the focus of the study was describing the rationale and the opportunities and challenges of implementing its microfinance programme. It is not intended to serve as an evaluation of the programme but rather to provide insights into programmatic approaches as they unfold on the ground. Ahmed (Elehemier)

notes that while there is a generic commitment to non-discrimination in its overall statement, there was no evidence of specific statements to redress religious inequalities or promote FoRB in its programme statement.

The author notes a number of important observations regarding the programme design. Funded by Saudi Arabia, the IsDB has a commitment to promote globally Shariah-compliant finance practices, one of which is Islamic Microfinance. Yet in a post-civil war context, in which people remember that in the name of an Islamic regime they suffered the worst atrocities, the appropriateness of yet again using 'Islamic' for an economic programme was questioned. Moreover, the question of the legitimacy of the actor providing the support is brought into question where mistrust prevails. In a context where the people believe that the Saudi Arabian government propped up and supported the Islamic project of the Sudanese government that oppressed them, can a Saudi-based initiative, in this case a Bank project, be trusted?

Ahmed (Elehemier) warns that in contexts of extreme poverty and deprivation, people were so desperate for sources of finance, they trusted their religious leaders who encouraged them to take part in the programme. The role of religious leaders in facilitating and enabling the implementation of the programme was central: they were the main sources of information about the scheme, they served as guarantors, and they actively promoted people's uptake of the loans.

However, Ahmed (Elehemier) warns astutely that it is important not to conflate participation with buy-in. Members of religious minorities and animists may have participated in the microfinance scheme out of desperation; however, underneath the surface, there are simmering sources of deep mistrust towards the initiative and the intentions of those presiding over it. With a history of having suffered multiple attempts at Islamicisation of their culture and people, the advancement of economic services under yet another Islamic banner can only be a reminder of a religiously divisive era. It is reflective of the failure of programme designers to understand how collective memory of oppression influences people's ability to ignore the role of ideology. This presents international multilateral agencies with a real conundrum: what to do when your positionality – how people perceive you, independently of how you position or represent yourself – becomes a real obstacle for engaging in FoRB promotion?

## 6 Conclusion

Through the highly eclectic case studies presented in this book, readers will find recurring patterns of the power of ideologies of religious otherization, the intertwining of struggles for political, social, and economic justice with the quest for religious equality, and the many ways in which people experience FoRB violations – even when they do not name them as such. These case studies provide exciting insights into how **not** to engage in FoRB promotion, but they also point to social justice struggles where the quest for religious equality lies at heart. It is hoped the case studies will inspire others to undertake further research towards understanding the power configurations that shape people's realities of religious otherization and exclusion, in all of their complexity and dynamism.

## Notes

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- 1 Mariz Tadros, Professor of Politics and Development, Institute of Development Studies, University of Sussex, UK.
  - 2 **CREID**.
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## PART 2

# **Religious Inequalities in Education, Health, and Economic Wellbeing**

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## Chapter 2

# Intercultural Training, Interfaith Dialogue, and Religious Literacy: Minority Groups in the Israeli Health-Care System<sup>\*†</sup>

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### 1 Introduction

This chapter seeks to analyse the extent to which intercultural competency training, delivered by interfaith practitioners, advances freedom of religion or belief (FoRB), and enhances patient and staff experiences and health outcomes for minority faith communities in Israel.

The Universal Declaration of Human Rights (UDHR) defines the right to FoRB as follows:

Everyone has the right to freedom of thought, conscience and religion; this right includes freedom to change his religion or belief, and freedom, either alone or in community with others and in public or private, to manifest his religion or belief in teaching, practice, worship and observance (UDHR, Article 18).<sup>2</sup>

Notwithstanding critiques and concerns about FoRB itself and the impact of interventions within FoRB-related issues,<sup>3</sup> recent years have seen a proliferation of initiatives working within this space.

Therefore, for the purposes of this study, understanding the broader context in Israel and the Palestinian Territories in terms of the wider human rights landscape is important. For many observers, the promotion and protection of FoRB in Israel and the Palestinian Territories is seen through the lens of unresolved conflicts (which include the intersection of religion, religious identity, and politics), the most notable example being the 2018 Nation-State Law which arguably entrenches discrimination and socioeconomic divisions between Jews and non-Jews in Israel (The Association for Civil Rights in Israel 2018).

One area of impact of those divisions is the health and wellbeing of minorities. This chapter's literature review (section 2) explores the evidence connecting the experiences of minorities in a society to poorer health outcomes. It seeks to rearticulate that experience within the context of the Israel and the Palestinian Territories conflict and explore whether religious differences in Israel predetermine poorer health outcomes for non-Jews and whether interventions can be delivered to reduce differences in outcomes. The latter question – whether interventions can enhance experiences of

minorities – is the focus of the remainder of this chapter. Section 3 sets out the purpose and method of the case study, including an examination of the Israeli health-care sector and the data-compiling process. Section 4 draws out themes and findings from the interviews, examining the impact of intercultural competency training in relation to the experience of individuals identifying with minority religions, and Section 5 offers conclusions.

## 2 Literature review

Because of the religious dimension in the Israeli–Palestinian conflict, an individual’s experiences of the conflict are a result of their religion or belief, which possibly undermine an individual’s rights to FoRB. As will be explored later in this chapter, patient and medical practitioner interviewees shared experiences of discrimination on the grounds of their minority faith backgrounds.

The Israeli–Palestinian conflict presents a challenging context from within which to disentangle or determine the extent to which FoRB is a human rights priority, or, conversely, a focus for human rights violations. The United States Department of State’s *Israel 2019 International Religious Freedom Report* says: ‘Because religious and national identities were often closely linked, it was often difficult to categorize many incidents as being solely based on religious identity’ (Office of International Religious Freedom 2019: 32).

The challenge for the remainder of this literature review is to navigate this complex context to see how minority faith communities and individuals in Israel experience the health-care sector, and to what extent intercultural competency training can be understood as a tool to address inequality, particularly when experienced as a result of discrimination against those of minority faith identities.

In conducting this literature review we sought to explore three key areas. As this study explores the impact of intercultural competency training delivered by interfaith practitioners on the experience of individuals identifying with minority religions within the health-care system, we sought to first review the literature of existing such experiences, and second, the literature relating to intercultural competency interventions that are taking place in Israel and the impact these are having; and lastly, we looked specifically at the religious dimension and how interfaith dialogue as a cultural competency impacts the experiences of minorities in the health-care sector.

### 2.1 Health outcomes for minority religious groups

As part of a 2018 study exploring health-care disparities among vulnerable populations of Arabs and Jews in Israel, scholar Efrat Shadmi claimed that ‘Arabs in Israel have been shown to present poorer health-care utilisation patterns and worse health outcomes in a wide variety of clinical domains’ (Shadmi 2018). In her study, which includes significant volumes of data outlining disparities (*ibid.*), Shadmi also critiques other studies,<sup>4</sup> one of whose authors suggest that those disparities are not so acute. She suggests that a range of factors must be taken into account, notably ‘the relative contributions of individual socioeconomic status, psychosocial and health behavioural factors’ (Daoud *et al.* 2018). A 2018 national survey of ethnic differences in knowledge and understanding of supplementary health insurance found that,

In spite of universal health care, there are inequalities between Arabs and Jews in health and health care... The Arab population has poorer health status compared to the Jewish population... and tend to reside in peripheral areas where the access to health professionals and services are lower. Together with language and cultural barriers, all these factors may contribute to inequalities in health.

(Green *et al.* 2017: 2)

Accordingly, it is hard to determine whether those discrepancies are the result of poorer provision of health care in the areas in which those populations live, structural discrimination issues on the grounds of religious or ethnic differences within those institutions with existing health inequalities, or a combination of those factors.

Lastly, a recent study into the satisfaction with primary care physician performances conducted by Samah Hayek and others, found that 'Jews and Arabs were very satisfied with Primary Care Professionals' [PCPs] performance. However, there are ethnic differences in the extent of satisfaction level related to the performance of PCPs' (Hayek *et al.* 2020).

## 2.2 Intercultural competency interventions

The need to work towards improved cultural competency in the Israeli health sector has been an objective of the Israeli Ministry of Health (MoH) for many years: between 2011 and 2014, ILS 2.2bn (US\$65m<sup>5</sup>) was invested in infrastructure and manpower and ILS 1.6bn (US\$48m) on reduction of economic and cultural barriers to health-care services so as to 'mitigate health inequity' (Horev, Averbuch and Kedar (2013) cited in Horev and Avni (2016)). During and since that period, a range of MoH publications have highlighted progress made, including:

- Policy around language in the public space and in interpersonal communication (MoH 2016).<sup>6</sup> This includes ensuring hospital signage in multiple languages.<sup>7</sup> It also includes written resources, in wards for medical professionals, as well as communication between practitioner and patient.<sup>8</sup>
- Setting up and running a telephone call centre providing real-time translation services from Hebrew into Arabic, Russian, Amharic, and French for people who undergo community and inpatient medical care. The centre started as a pilot project in 2013 and reached full speed in 2014. Between 2013 and 2015, the number of calls to the translation service in Russian grew by 464 per cent, Amharic by 75 per cent, and Arabic by 35 per cent (MoH 2016).
- Publication in 2011 of cultural competency training in all hospitals in Israel, including a directive for hospitals to appoint a staff member as responsible for 'cultural competency' (MoH 2011).
- The annual strategic plan, and its national implementation of cultural competency 'Coping with Health Inequality' by the Israeli MoH.<sup>9</sup>
- Tracking and analysing patient satisfaction by the MoH in relation to cultural and ethnic interpersonal relations (Hayek *et al.* 2020).

- Orit Eldar Regev (2013) has researched the specific role of nurses and nursing schools in this field.<sup>10</sup> One of her main research questions is the extent to which ‘Israeli nurses meet and care for patients of various cultural backgrounds’, and the ways they measure their ‘preparedness, sensitivity, efficiency and awareness of all these issues’ (*ibid.*). Her results point to sentiments, based on interviews with 690 hospital nurses, that

most hospital nurses in Israel feel only partially competent to deliver cultural care properly to their diverse patients, and that cultural competence largely depends on previous experience with culturally different patients, and also on preparedness for training courses. For future health-care policies it is important to mention that the data clearly showed the need to introduce training of cultural competence in nursing schools (*ibid.*).

Further,

despite the moral duty and the social, medical, and economic logic behind this goal, much difficulty surfaces when implementing national policies that propose to attain it. This is mainly due to an implementation gap that originates in the complex interventions that are needed and the lack of practical ability to translate knowledge into practices and policy tools (*ibid.*)

One case study focuses on the time it takes to prepare and implement strategies for improving intercultural engagement. A recent case study concludes that: ‘In the meantime, efforts should be focused on PCP–patient interactions including interventions to increase patient’s [*sic.*] health literacy, improve PCPs’ interpersonal skills (e.g. listening, empathy toward patients, emotional support, and friendliness), increase the time spent with the patients, and training professionals to be culturally competent and understand their patients’ needs’ (Hayek *et al.* 2020).

Some of the most thorough research determining what constitutes intercultural competence has been conducted by Michal Schuster, who focuses on minority needs and accessibility in Israeli health care.<sup>11</sup> In one study into the level of cultural competency (CC) existing within Israeli hospitals and what helps to promote it (in which 35 of 36 general hospitals participated), it was found that

CC is mainly perceived as ‘language accessibility’ (i.e. providing the linguistic needs of patients) and less as broader cultural adaptations... Despite the awareness to the importance of CC and the willingness to promote it, the subject is competing with other relevant issues on the agenda of hospital leaders, and in practice, implementation is low to middle (Schuster, Elroy and Rosen 2018).

It is therefore evident that to the extent delineated above, interventions are being delivered to embed CC practices within the health-care sector. However, the extent of intentional engagement with the religious diversity of patient populations remains unresearched to date. A potential gap in

the research could be identified here, where a specific focus on questions as to how interventions delivered actually encourage and enable religious minorities to feel as if their concerns are being addressed.

### 2.3 Interfaith dialogue as intercultural competency

In the aforementioned study conducted by Schuster *et al.* (2018), ten different CC aspects were ranked across hospitals in terms of how well they were being implemented. Topics included: appointment and development of the CC coordinator; cultural adaptation of human resources policy; adaptation of the physical environment; and translation. There was one aspect which related directly to the question of religion (religious and cultural services). Hospital managers were asked to self-score their institutions' preparedness of each topic. Religious and cultural services was the topic that ranked highest across the survey. It is worth noting, however, that respondents had to answer three questions regarding religious and cultural services relating to the provision of prayer spaces, accommodation of religious holidays, and taking a patient's religious identity into account when providing care. The survey did not differentiate between majority and minority provision and it is hard to draw conclusions about the extent to which the needs of minority religious groups are fully considered.

It is interesting to note that, despite religion and politics being deeply intertwined in the Israeli context, the Schuster *et al.* (2018) study makes relatively little reference to religion. Even though the hospital management is aware of the need to enhance CC within their institutions, religion as a component of CC is perceived as relatively unimportant. Indeed, it suggests that religion and religious diversity is poorly integrated into mainstream notions of CC. As a result of this element of CC being under-explored, interventions that emerge from the analyses detailed in this chapter will be less able to deal with the religious diversity within hospitals and, as such, less able to ensure that all individual rights to FoRB are protected.

It is this gap which the intervention delivered by the Faith & Belief Forum (F&BF) seeks to address, namely that by delivering CC within an explicitly interfaith context and framing, participants are given a clear opportunity to reflect on that diversity and to begin to listen to the experiences of patients and colleagues. Having done so, they are then in a better position to develop collaborative solutions to the question of religious discrimination.

## 3 Methodology and approach

### 3.1 The interviews

To explore the question of what impact intercultural competency training delivered by interfaith practitioners had on the experience of individuals identifying with minority religions, at least one person from the following categories was interviewed:

- F&BF intercultural training facilitators;
- Caregivers who participated in intercultural training; and
- Senior staff in managerial teams who oversaw training events.

This enabled the study to, firstly, gain some indicative reflections from a cross-section of trainings; secondly, hear about the impact of the training on caregivers themselves; and thirdly, find out about the institutional impact.

Giving a platform to the voices of, and understanding the experience of, minority individuals was a priority, but it was felt especially pertinent for the caregiver interviewees to be from minority backgrounds, so as to explore how the training impacted their experience of working in the sector as a minority.

To this end, the following professionals were interviewed according to these three categories:

- Two Muslim Palestinian caregivers: one working in the maternity section and the other in orthopaedics. These two caregivers were selected as they had participated in intercultural competency trainings and could provide reflections from a Muslim and Palestinian perspective. They were interviewed in Arabic by a Palestinian Muslim consultant to F&BF who carried out some of the interviews.
- Two Israeli Jews were interviewed: one working in paediatrics and the other in an emergency trauma unit. Both were interviewed in Hebrew by the lead researcher.
- In addition, two senior managerial hospital staff were interviewed, both of whom were Israeli Jewish women. They were interviewed in English by a Palestinian Muslim consultant to F&BF.
- A Muslim Bedouin intercultural training facilitator was interviewed out of the pool of facilitators. The selection was made because she could present a minority voice required for this case study. Additionally, she was able to provide important reflections for this case study both as one who runs F&BF sessions, and also in her capacity as a medical professional in the Negev region.
- The Jerusalem Intercultural Center,<sup>12</sup> which pioneered intercultural competency training in hospitals, was also consulted.

The researcher conducted interviews in Hebrew, Arabic, and English, which was critical to ensuring accessibility and to mitigate, as far as possible, self-censorship on the part of interviewees from minority backgrounds.

It was important to interview caregivers from a majority background in order to explore the impact that training had on their relations with minority colleagues and also their care towards minority patients. This means that any impact on patients is described through the perspective of the practitioner who gave the treatment.

The interviews aimed to collect the reflections of those involved in intercultural training from different perspectives: whether participation had changed their level of competency in dealing with colleagues and patients in a manner sensitive to their cultural and religious needs, and if there have been changes in hospital practices in relation to support and engagement with minorities.

The Covid-19 pandemic made it impossible to meet interviewees in person as this is a challenging time for hospitals, and because during late April and early May 2020 Israel was in lockdown. This affected methodological choices as face-to-face meetings could not be carried out. It also reduced the number of interviews conducted. All interviews

were therefore conducted through one or more phone calls, in the period February–June 2020, following the same questions with each interviewee as outlined in Annexe 1 – but with room for additional elaboration if interviewees felt inclined.

### 3.2 Positionality of researchers

There are limitations that accompany all qualitative research, notably the inevitability of subjective interpretation and researcher bias. We sought to balance bias by involving researchers from both majority and minority backgrounds.

The lead researcher holds an MA in Intercultural Therapy from Goldsmiths' College, University of London, a PhD in philosophy from University of Haifa, and is a researcher in comparative religion at Bar Ilan University. She is also project manager of F&BF Middle East and is a Jewish Israeli resident of West Jerusalem. Others involved in the research process were a Muslim Palestinian F&BF facilitator PhD candidate at the Hebrew University of Jerusalem, and a Jewish Israeli academic reviewer from the Nursing School of Hebrew University of Jerusalem Hadassah Hospital.

### 3.3 The hospitals and health-care system

The intercultural competency training, the impact of which this case study seeks to examine, has been delivered in different hospitals, each with different demographics. The hospitals where the interviewees had experiences were as follows:

- Hadassah Ein Karem: with 600 beds, situated in West Jerusalem, this hospital provides 'medical services to Palestinians who live in the West Bank and Gaza Strip'.<sup>13</sup>
- Hadassah Mount Scopus: with 300 beds, this hospital is based in East Jerusalem and, given its locality in a primarily Arab neighbourhood, and proximity to Palestine, has around 30 per cent patients of Arab background (compared to the national Arab population of approximately 21 per cent<sup>14</sup>).
- Tel Aviv Sourasky Medical Center – Ichilov: with 1,500 beds, this is the main hospital complex serving Tel Aviv and the third-largest hospital complex in the country.<sup>15</sup>
- Kaplan Hospital: with 625 beds, this hospital is in the central Israel city of Rehovot and treats patients from a broad range of religions and cultures; it serves residents in central and Southern Israel.<sup>16</sup>
- Barzilai Hospital: with 617 beds, situated six miles from Gaza, this hospital is occasionally the site of reported discriminatory racial profiling of Arabs, and also exclusion of non-citizens (ACRI 2020).

F&BF currently works only in the Israeli health-care system and not in hospitals in the Palestinian Territories. Hence the reason the interviewees were selected from these hospitals and why only the impact on experiences within the Israeli health-care system is being explored, despite the participation of Palestinian interviewees.

Health-care professionals in Israel encounter patients from a variety of ethnic and cultural backgrounds daily, and at moments of acute need.

These groups include Israeli Jews from a range of ethnic backgrounds (European, African, Middle Eastern), Israeli Arabs, Palestinians (including Muslims and Christians), Druze and Bedouins, as well as smaller but significant communities from East Africa, South Asia, and Southeast Asia.

Providing health-care professionals with the skills and necessary understanding to deal with the different needs (e.g. relating to end of life, organ donation, decision-making protocols, blood transfusions, modesty, etc.) of their diverse patients, is crucial to both patient outcomes and broader societal relations.

Though hospitals may be a place where people come together, this does not imply that interactions in hospitals are free from the broader societal dynamics, such as segregation between groups outside the health-care setting. Indeed, the medical sphere could actually present

context[s] where a sense of superficial coexistence already exists – where the assumption is that their being together every day implies that they are integrated. Yet in these spheres there remains a cognitive segregation where, even though professional integration is desirable, anything deeper than this rarely occurs (Feldmann Kaye 2012).

Those working in hospitals can have doubts and uncertainties about the freedom to express their religious or cultural identity, claiming that the role assumes the relinquishing of strong religious and cultural identities on the part of those entering the institution, leaving religious differences unacknowledged and unaddressed (ACRI 2020). At the same time, this type of coexistence in an Israeli hospital can provide fertile ground for conducting dialogue groups (*ibid.*). It is against this backdrop that this case study has been developed.

### 3.4 Intercultural training

The case study is based on an exploration of intercultural training and the impact of this on health outcomes for minority faith groups. F&BF is one of several providers of this training in Israel. Trainings are run by the F&BF team based in Jerusalem, which consists of a project manager, and six freelance facilitators; three are Israeli Jewish, one is Israeli Arab Bedouin, and two are Palestinian.

The trainings use a hybrid model combining study cases, interactive dialogues, discussions, and Scriptural Reasoning (SR). SR is a form of inter-faith dialogue which bases learning about other religions and cultures on group readings of selected scriptural texts.<sup>17</sup> Religious texts provide opportunities for discussion on issues of ethics and human behaviour and demonstrate the multiple layers of interpretation over centuries of engagement with intersections between health care and culture. The trainings do not promote religion and are designed to be inclusive of those who do not hold religious beliefs. One aim of the training is for health-care professionals to be able to recognise their own religious and cultural prejudice in their practice.

SR as used in health-care settings can enable deeper forms of engagement and cohesion between participants by: allowing them to enter into dialogue with one another; acknowledging their respective backgrounds and

identities; and reflecting on how these play out in their practice as medical professionals (Feldmann Kaye 2012). The trainings also use elements of training materials developed with Tanenbaum Center for Interreligious

Understanding,<sup>18</sup> which focus on intercultural competency, allowing for the development of culturally competent communication skills.

In these ways, the following areas of health care are covered during F&BF intercultural trainings: dietary requirements; dress and modesty; hygiene; informed consent; observance of holy days and rituals; complementary and alternative medicine; organ transplants and donations; reproductive health; pregnancy and birth; end-of-life care; acceptance of drugs and procedures; blood and blood products; conscience rules; prayer with patients; and proselytising.

#### **4 Interviews and analysis**

As discussed earlier, the responses of the interviewees were collected with a view to assessing their understanding of how intercultural competency training delivered by Muslim and Jewish interfaith practitioners influenced and enhanced the experiences of faith minorities within the selected Israeli hospitals. The interviews related experiences of both patients and health-care providers from minority backgrounds. The bulk of the following analysis is therefore split into two sections, namely: patient experiences and health-care provider experiences. Section 4.3 explores the challenges relating to FoRB within the context of the Israeli–Palestinian conflict.

##### **4.1 Perceptions of patients' experience among health-care workers**

To understand the impact of the intercultural training, perspectives on the pre-existing situation in their given workplace were sought from health-care workers as per their anecdotes of situations they witnessed on the ground – patients themselves were not interviewed. The situations described below are therefore of a second-hand nature as told by health-care workers and managerial staff. They spoke about general difficulties faced by minority patients due to a lack of cultural understanding and perceived discrimination and gave examples of incidences where this led to poor or fatal health outcomes. Three examples were: (1) a Jewish girl of Ethiopian descent who was re-hospitalised apparently due to her father mistakenly believing her skin medication should be taken orally; (2) a non-Hebrew-speaking pregnant patient who was given instructions for what to do if her baby stopped moving – neither she nor her husband understood the instructions, however, and a week later she suffered a stillbirth; and (3) refusal of a Jewish hospital manager to take advice from a Bedouin Muslim colleague around provision of a breast cancer awareness programme in her community. '[She] doesn't speak Arabic, she decided on the programme from her office without visiting the community.'<sup>19</sup>

There were also examples which spoke to unconscious biases and touched on examples of religious intolerance. One participant spoke about patients wearing niqab and said that health-care professionals 'might judge her by her appearance and say that she's uneducated or extremist'. These were juxtaposed with responses from participants from majority backgrounds who recognised the need for improved understanding of each other's religious practices and languages; the impact of the training was a

deeper appreciation of the importance of religious literacy and how it can impact outcomes for patients. One participant said: 'We need to learn a lot more about each religion in depth', while another conceded that 'I now recognise how important religion can be for a patient as it defines how they respond to medical matters.' This goes beyond simply knowing the religious identity of a patient but rather being able to endeavour to interpret the clinical experience of the patient through their religious identity – what their aversions or concerns may be, how they might make certain decisions, and what barriers they may be facing in the hospital.

Training delivered by a multifaith team with the use of SR as a method, in separate sessions from the general intercultural competency training, allowed for a deeper understanding: 'The texts help to understand the sources of religions, and therefore, how religious people will make decisions.' Participants gave specific examples of improved religious literacy and how this influences their provision as health-care professionals: 'A [patient] in danger can be treated on Shabbat or break their fast [during Ramadan] because I tell them that this is important for their wellbeing, and I try to use religious arguments because this is what's important for them.' In this specific case, a Muslim health-care professional suggested helping her Muslim patient through the use of religious language. The same Muslim health-care worker had also gleaned the knowledge of the Jewish ritual of Shabbat, and the concurrent problems related to working on the Shabbat, and used this for the apparent benefit of the patient, i.e. to demonstrate her awareness of the problem which would then enable her to respond on a level and with the relevance of the issue at stake, e.g. knowing which machinery and tests are prohibited on Shabbat.

Participants also spoke specifically about skills developed in trainings, such as dialogue and scriptural reasoning as highlighted above. Another was empathy: 'It's important to be empathetic even if the patients' decision contradicts our own beliefs.' Therefore, training established an understanding not only of the patients but also of themselves, their own biases and behaviours, and how to prevent complicity in discrimination to whatever extent possible. Interviewees noted that improved cultural competency served to enable health-care staff to take initiatives to raise and address the religiosity of patients even where the latter had felt wary of doing so: 'Some patients will keep their faith to themselves because they're in a hospital. Yes, it seems that their personal faith is in fact relevant and important to their treatment and relationships with us.' It therefore seems that the training empowers staff to become more aware of the complex and sensitive ways in which religion influences patients' engagements with the health services.

#### 4.2 Health-care provider experience

As previously mentioned, a great deal of the responses from the interviewees touched upon the impact that the training had on health-care providers themselves. Again, interviews gave an insight into the existing conditions from which the impact of the trainings was understood.

There were examples of Muslim professionals facing a lack of understanding from colleagues borne of religious illiteracy: '... the supervisor kept telling us to eat and drink, but she didn't understand what

Ramadan means'. Notably, there were references to the understanding towards Muslim colleagues being less than that of the understanding they showed for Jewish counterparts:

*In Ramadan, it's very difficult for [colleagues] to understand that we have been fasting all day long, so they give me evening and night shifts... they don't understand that we need a break for Iftar. At Kippur it's different; they don't have to do anything, so we do everything.*

This frames this issue not only as one of general lack of cultural competency but one which disproportionately affects minority religious communities within the health-care system.

This disparity was also referenced in terms of spoken language. One Arab health-care interviewee noted that:

*In my ward, there's only me and another Arab nurse. Once we were at the front desk talking in Arabic about personal issues, then one of the older nurses who was sitting not too far away slammed her hand on the desk and told us that we live in Israel and we should speak the language of the country, Hebrew, and that she didn't want to hear Arabic. I didn't reply but when we complained to the head nurse, who agreed with them, she said not to speak Arabic, and said that some of the patients complained about hearing us speak Arabic. On the other hand, Russian nurses speak Russian even when they give information to the nurses in the next shift, they do it in Russian, even when I am with them.*

Health-care staff from minority backgrounds also referenced discrimination and 'prejudices and misconceptions... microaggressions' from patients. One Muslim nurse who was interviewed noted that,

*One patient I had in the maternity ward was racist, and the other Arab nurse warned me about her before she went home. I went to take her temperature and blood pressure, she wouldn't even look at me... the patient was crying hysterically, and she accused me of wanting to kill her and her son... she even called security and told them that I wanted to kill her.*

The interviewee did not state the religious affiliation of the person she was treating. Arab staff turn to others from their ethnic group for support where the institutions fail them:

*The supervisors came and talk[ed] to her, but what was really upsetting for me is that they told her that she can file an official complaint... I felt like I had no backup, I did not feel protected... I went to the head nurse... she wouldn't allow me to complain about what happened... she told me that no one will listen to me.*

Examples such as these go some way in explaining why trainings might alleviate prejudice or disrespect experienced by staff and patients. One F&BF training facilitator commented that:

*For an Arab to open up in a dominant group, we need to give them more time so they feel at ease and participate in the discussion; they know that we're a minority. We're voiceless and we don't want to face problems, or talk about politics or how I am discriminated against.*

One possible inference from the above is that this could also link to the fear of repercussion if someone from a minority group expresses an interest in taking action, and in turn raises the issue of the extent to which they would receive institutional support. This was a point that was merely hinted at, and the participants said that they had not sought to take further action.

Lastly, interviewees referenced examples of how an absence of minority language learning not only results in poorer health outcomes but also disproportionately burdens staff from minority backgrounds who are native speakers and thus required to do extra work:

*I believe that Jewish nurses should learn some Arabic, some patients don't speak a word of Hebrew, and they need to know how to communicate with them without asking the only Arab nurse to come translate all the time despite having my own patients and my own responsibilities.*

The interviewees reported a positive impact of the training, both on their own understanding – ‘It’s like holding a mirror up to ourselves and being forced to look at our own prejudices’ – as well as overall intercultural relations between colleagues – ‘I had the first chance to consider whether who I am affects my relationships with people on my team’ – and this was common across responses from both minority and majority background interviewees.

The interfaith element of the trainings as well as the focus on religion in the training methods seemed to lead to increased religious literacy as well as a greater appreciation of the importance for intercultural relations. One training participant stated: ‘This whole activity opened my eyes; they had been closed to people of other religions... I need to now be able to use knowledge of religions to work with people in a more understanding way’; while another commented: ‘Now we’re in Ramadan, we come together to eat Iftar, the non-Muslims help us sometimes and cover the time we go out to eat.’

One hospital manager interviewee was asked whether she believes that intercultural training has had an impact on her staff. She responded that ‘afterwards, sometimes months afterwards, their language is more developed, they’re more open’, signifying more empathy and willingness to develop deeper relationships with colleagues from different backgrounds. She can see that ‘things were internalised’. Another hospital manager said: ‘They are open to learning. They talk about it afterwards.’ And a third hospital manager reflected that now they ‘only witnessed the positive aspects of working in a multicultural team’, and that meetings between

them ‘become richer’. It seems that the training opens up space for health-care staff from all backgrounds to reflect on the role their faith identity plays in their professional relationships and to consider both the challenges and opportunities.

#### 4.3 The Israeli–Palestinian conflict

In the divided and contested context of Israeli society, hospitals and health-care settings remain one of the few spaces where patients and staff interact and work side by side on a daily basis. It is not uncommon to observe Arab doctors treating Jewish patients, and vice versa. Despite the sensitivities associated with talking about the Israeli–Palestinian conflict and the reluctance among health workers to bring this into their workplace, it is impossible to ignore the context in which their work is carried out. Even where the topic is deliberately avoided, it can be perceived in the hostility that the training approach is sometimes met with, as the facilitator interviewee explained:

*In our training, we try not to blame anyone. People talked about racism and discrimination, but we did what works best to keep it professional and away from politics. If we only give examples about the Arab sector, people will assume we’re leftists, that’s why we’ve bring more examples from every sector.*

This might present one reason why several different religious minority groups’ beliefs and faith are brought into the discussion (e.g. Christian, Arab, Druze); however, it is clear that this broader picture includes a variety of minority groups out of a recognition that they also need to be acknowledged and addressed. The trainings often serve as an opening into necessary conversations about the conflict dynamics within the health-care sector, although from experience on the ground, there is not a simple answer as to whether the conflict is palpable in the health-care sector. Sometimes it is viewed as neutral ground where people come together to save lives, and sometimes it is seen as ignoring the situation in a supposed ‘neutral’ environment. The trainings delivered have often given voice to these different opinions, as to how far the conflict is sensed. One interviewee felt that such conversations would otherwise not take place: ‘We ignore all this stuff about the conflict. It was hard to admit that those feelings were really there simmering underneath our pretend friendships.’ The result of these conversations is that participants are able to separate the identity of their colleague or patient from the particulars of or their feelings about the conflict, as explained by one interviewee: ‘I need to learn to respect people of other religions, and to recognise that what happens around us, is not a result of their beliefs or actions.’

It appears that this in turn leads to improved relations between colleagues and increased solidarity among team members, and goes some way in providing the much-needed support from the majority for health-care staff from minority backgrounds in the face of prejudice and discrimination. As described by one Jewish Israeli interviewee:

*During the second intifada in one of my shifts in the trauma unit, I was working with a nurse called Muhammad, and people were protesting and saying that they did not want him to take care of their loved ones, we were treating victims of a bus bombing at that time. I told them that he is a competent nurse and he will take care of the patient, but I had to be very sensitive and understanding of their pain. Standing up for my colleague and defending him is important.*

The response of this nurse combined with the timing of the incident shows a strong shared humanity in the face of the live conflict and any personal responses it may evoke.

Once conversations can be carried out about religious identity and needs as per the trainings, the empathy and cultural understanding derived from dialogue can translate into improved feelings across groups who may otherwise see themselves as being situated along conflict fault lines. It seemed that interviewees spoke about improved relations between groups where the conflict is concerned, in terms of religious tolerance:

*In one case, this patient who was a religious Jewish man was praying and a nurse who is a Palestinian woman wearing a hijab stood by the door until he finished his prayer to give him his medication. The same happened with a Muslim man and his Jewish nurse. The patient said that he felt more humanised, that religion was important for the patient and the nurse and this unified them. The nurse knew that medications are not the only part of healing, and that following cultural and religious rituals was as important.*

This link supports the idea that improved intercultural relations improves FoRB, and also that increased religious literacy and critical thinking around one's own identity contributes to improved relations in Israeli society, of which the hospitals are an element.

Conversely, intercultural competency trainings that omit the faith or belief element may suffer from a decontextualisation from the power dynamics at play. A Jewish Israeli senior member of hospital staff said: '[T]he hospital [is] very multicultural... I don't see challenges or negatives when we get together, only the positive things... but politics is very complicated and is not a part of the conversation.' This approach, while it may lead to increased cultural competency, does not necessarily provide space for challenging admissions to take place and for the level of critical reflection and unpacking of unconscious bias required for institutional change and enhanced experience for staff or patients from minority backgrounds.

## **5 Conclusions**

This case study set out to explore the extent to which intercultural competency training, delivered in interfaith settings within health-care institutions in Israel, enhances the experience of religious minorities in particular.

The case study was limited in that interviewees did not reflect a broad population group and, therefore, statements on the medical sector in the

Israeli society could not be gained. One example is that interviewees were either Muslim or Jewish, meaning that other minority groups, such as Christians and Druze, were not reached. In future research, it would be important to ensure that those of other minority faiths are included in the research. Improved research would ideally collect testimonies from a broader cross-section of society. This would require giving further attention to accessing other sectors of society as they are represented in hospitals. Those interviewed, and the hospitals involved, were all well-known hospitals in cities or large towns. Smaller medical centres were not represented, and nor were those of peripheral geographic areas. In future research, we would want to collect testimonies from a cross-section of hospitals and medical centres in locations around the country.

This case study was limited to research addressing minority religious groups. Given this focus, other important issues that arose through this study could not be addressed thoroughly – one main example is that of spoken languages. In all the interviews, the issues of language, translation, and interpretation were raised. It is recommended that future research considers the inter-connections between religion and language.

An additional recommendation for further research is related to the inter-religious study method, Scriptural Reasoning (SR). It would be worthwhile exploring further the contexts in which SR is practised, such as prisons and schools, and then aiming for a greater understanding of the specific nature of SR in the health-care context. It is hoped that these issues can be addressed in future research, as contributions to this case study.

Overall, findings of this study can be summarised as follows:

It has been shown that health outcomes are connected to group and individual identities, which could be enhanced by investment in improving the intercultural competencies in hospitals. However, in spite of the fact that the ongoing conflict can be and is seen as having a religious element, religious affiliation for those on the margins is poorly expressed in the narrative relating to those differential outcomes or to the experiences of professionals working in the health-care sector.

While there are robust frameworks within which cultural competency interventions are designed and delivered, religion is poorly integrated into the analysis and frameworks, with hospital managers left to determine for themselves how and what their priorities should be in terms of enhancing culturally competent practices within their institutions.

An interfaith approach to cultural competency, part of which includes an interfaith dialogue component, provides a space to raise incidences of discrimination and violations of FoRB, and thus enables all participants to reflect on their own experiences of how religion is handled in the workplace. In particular, these spaces have been effective at enabling health-care staff to reflect on the intersection between identity and patient relationships. Understanding the religious and cultural needs and practices of patients from different minority faith backgrounds enables health workers to adopt strategies that can lead to better decision making and treatment, thus creating the conditions for enhancing health outcomes for minority patients.

While the focus of the trainings delivered by F&BF is to improve participants' understanding of the needs of different groups of patients as

defined by their religion, in actuality, one of the significant outcomes of the training is the building of awareness of the multiple and serious challenges faced by health-care professionals from religious minorities in terms of the discrimination which they face on a daily basis, both from patients and colleagues. Trainings delivered by multifaith teams allow professionals from minority backgrounds to vocally reflect on any barriers to FoRB which may otherwise be taken for granted. Being heard in this way is a key outcome for interfaith training and can assist in improving the workplace experience for staff from minority backgrounds (as well as the effectiveness of teams within hospitals – leading to improved health outcomes for patients). Developing strategies to protect workers from minority backgrounds would certainly enhance FoRB outcomes for those individuals.

Understanding how the situation within the health-care sector relates to the wider context (of a conflict in which religion and politics are intertwined) is made all the more challenging because the religious element of the conflict is poorly understood and articulated. Nonetheless, what this study supports is that patients and health-care staff suffer religious discrimination for a variety of reasons, primarily due to a lack of knowledge of the other. As such, imagining a society in Israel where FoRB is universally respected and upheld requires imagining a society where the conflict is fully and justly resolved.

Despite the complexities of the wider context, developing strategies and approaches to enable an analysis of the context which recognises and acknowledges the religious diversity is critical in order to address existing religious discrimination.

## Annexe 1 Interview questions

### Group 1: Caregivers and participants of intercultural training

Questions for participants *vis-à-vis* (a) patients (b) within their teams:

- Can you tell me more about yourself (where you work, your role)?
- In which ways, if any, do you face intercultural issues in your line of work?
- Can you give a couple of examples of those issues (i.e. where you see them play out)?
- How are/were these issues handled? Is this considered the typical approach to dealing with them?
- What are the relations like in your line of work between peoples of different religions and cultures?
- What are the main challenges?
- What are the negative and positive aspects of such interaction?
- How do you think religious/cultural minority groups are treated in your department or hospital?
- Have you ever participated in or facilitated an intercultural or cultural competency training in your institution or other institutions?
- In which ways, if at all, has your participation in intercultural training changed the way you think, behave or relate to people?
- Can you give examples? (Ask for more until you get 2 or 3.)
- What would you want to change if you could, to improve intercultural relations in the health-care system?

### Group 2: Managerial staff

- Can you tell me more about yourself (where you work, your role)?
- What are the relations like in your line of work between peoples of different religions and cultures?
- What are the main challenges?
- What are the negative and positive aspects of such interaction?
- How do you think religious/cultural minority patients are treated in your department or hospital?
- Does the Ministry of Health offer guidelines and training on intercultural training?
- Does the hospital itself provide intercultural training?
- Why do you encourage intercultural training?
- In which ways can training have an impact on the ways in which caregivers respond to the needs of patients?
- Can you give examples? (Ask for more until you get 2 or 3.)
- What would you want to change if you could, to improve intercultural relations in your hospital?

Group 3: External bodies

- Which projects do they run in hospital? (See their website and blog on this area first, which has information.)
- What are the challenges, in their view, in Jerusalem hospitals?
- Are there issues in Jerusalem health-care institutions which are different to those in other parts of the country?
- What do they feel the effects of their programmes are, and what change is made – some reflections? (Does not necessarily require data.)
- Does the Ministry of Health offer guidelines and training on intercultural training? Has this changed in the last 2–3 years?
- What would you want to change if you could, to improve intercultural relations in Israeli hospitals?

Group 4: F&BF Middle East facilitators

- Can you describe some of the work you've done in health care with a focus on intercultural relations? With the F&BF?
- In which ways is the work in hospitals important? For example, including minority faith communities, trying to improve relations between medics and patients?
- Can you share any thoughts on the content and delivery of F&BF methods?
- In which ways, if any, are they reflective of the way you'd want to run a training?
- What might you change about the training? Or do differently?
- In which ways, if any, do you think participants are influenced by the training?
- Can you name two examples of changes they've seen.
- Would you be willing to share reflections on changes they experience during the process?

## Notes

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- † The author wishes to acknowledge the significant contribution of Faith & Belief Forum colleagues – Phil Champain, Josh Cass, and Evi Koumi. Academic guidance was provided by Dr Anita Noble; interviews were conducted by Amal Khayat.
- 1 Miriam Feldmann Kaye, Lead Researcher and Project Director of the Faith & Belief Forum (F&BF) Middle East, Jerusalem, Israel.
- 2 **Universal Declaration of Human Rights.**
- 3 See, for instance, Hurd (2015) for critiques exploring the tension between international legal, political, and societal interventions delivered under the banner of FoRB promotion and the critical realities of how those communities and individuals receive and experience those interventions.
- 4 *Ibid.*
- 5 According to a September 2020 exchange rate.
- 6 Commitment to translation services by the Ministry of Health can be viewed at MoH (2016).
- 7 This has been addressed in Schuster, Elroy and Elmakias (2016).
- 8 This has been well researched in Elroy, Schuster and Elmakias (2016).
- 9 This has been described as a report ‘published by MoH ahead of the national conference and includes data on MoH and HMO activities to narrow gaps. Hospitals are also invited to contribute to the report; occasionally they, too, describe what they have done to mitigate disparities. The annual reports, along with MoH publications on health inequality and ways of dealing with it as well as other MoH publications on additional aspects of this issue over the years, have kept the struggle against health inequality on the agenda, furthered the sharing of relevant information, and incentivized and promoted competition so to continuously improve organizational action against health inequality’ (Horev and Avni 2016).
- 10 See also Noble *et al.* (2009), which examined cultural competence and ethnic attitudes of Israeli midwives.
- 11 **Dr Michal Schuster, Department of Translation and Interpreting Studies, Bar-Ilan University.**
- 12 **About the Jerusalem Intercultural Center.**
- 13 **Who We Are, Hadassah International.**
- 14 **Central Bureau of Statistics (in Hebrew).**
- 15 **Tel Aviv Sourasky Medical Center Wikipedia page.**
- 16 **Kaplan Medical Center website.**
- 17 See Feldmann Kaye (2012). See also **Cambridge Interfaith Programme and the Scriptural Reasoning website.**
- 18 **Improved Patient Care publications, Tanenbaum.**
- 19 Citations are from key informant interviews conducted during the period February–June 2020.

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## Chapter 3

# Freedom of Religion or Belief Integration for Sustainable Development in the Oyo State Local Government Scholarship Scheme, First Technical University, Ibadan, Nigeria\*

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### 1 Introduction

Every society is characterised by personal and collective actions that, to some extent, have developmental consequences, either as a development process or as an outcome (Pradan and Ranjan 2016). These actions, from either citizens or governments, will either be productive in promoting development, or counterproductive, impeding or reversing development. However, activities set to enhance development can be counterproductive if they are not well contextualised. One of the known contextual elements of significance to the political, socioeconomic, and general wellbeing of a society is religion (Kim 2003; Barro and McCleary 2002), and good as a development activity may seem, if it encourages religious discrimination or restricts religious freedom, its goal and sustainability is likely to be at risk.

The increasing rate at which free choice and expression of beliefs is getting restricted on a global scale (Stefanus Alliance International 2017) and rising concerns about their threat to other civil and political rights, cannot be overemphasised. In this regard, various governments will have to ensure that their activities take freedom of religion or belief (FoRB) into account. This will further strengthen democracy and civil society (Malloch 2008). Taking freedom and the opportunities offered by modern and democratic societies for granted without due consideration of religious differences may, in certain contexts, be causing religious conflicts and democratic destabilisation.

Founded as a government development initiative, the possibility that the Oyo State Local Government Scholarship Scheme (OYSLGSS) might have taken its religious implications for granted highlighted a need for this study. Its primary focus is to deepen knowledge of how the OYSLGSS has managed to uphold FoRB in its operations. The study looked at OYSLGSS operations at the First Technical University (Tech-U) in Ibadan, the state capital, in relation to religious difference as a form of social inequality. Areas of possible FoRB integration or religious discrimination and inequalities within the scheme, and the factors responsible for such inequalities, were

identified. The study also interrogates the sustainable development policy implications of the findings and makes appropriate recommendations for fairness and equity. The outcome of this research can be a veritable tool for effective policy management and inclusive development practices in the area of higher education.

The design of the study is enquiry aimed at understanding the religious implications around the OYSLGSS.

The questions informing this study are:

- 1 How has the scheme sought to integrate FoRB into its operations?
- 2 To what extent has such integration contributed to inclusive sustainable development?
- 3 What are the possible factors responsible for FoRB integration within the scheme?
- 4 And, from the findings, what are the opportunities to adopt sustainable religious fairness and equality in the future?

This chapter argues that a scholarship scheme like OYSLGSS as a deliberate development initiative can undermine FoRB if it is not structured and managed with ensuing outcomes taken into consideration. It also delves into the associated policy management demands of such a programme, within the contemporary setting of Nigeria, by identifying its level of compliance with other related national policies. The study identified the tendency to hide under the guise of ‘democracy is a game of numbers’ to promote religious ‘majoritarianism’ (where most development decisions favour religions in the majority) as a means to justify religious discrimination/ domination in a secular society.

### 1.1 Freedom of religion or belief

FoRB can be described as the protection of the rights of individuals, groups, or communities to profess and practice any kind of religion or belief, or have no belief at all (UNHRC 1993). It enables the right to have, change, or practise religion or belief at will without infringing on the human rights of others.

FoRB cuts across socioeconomic, political, cultural, and security spheres of societies to nurture diversity and pluralism in such a manner that resists authoritarianism, and to keep democratic systems stronger and uphold human dignity and common good (Nowak and Vospernik 2004; Malloch 2008). When religious freedom is lacking or restricted, the discrimination, resentment, conflict, and fear that undermine tolerance, stability, wellbeing, and peace for sustainable development prevail (Glendon 2002; Grim 2007; Stefanus Alliance International 2017). Such freedom should not only be a privilege for one denomination, or the possession of one faith against others. FoRB is a universal fundamental human right that is recognised in international treaties.

FoRB is enshrined in international documents such as Article 18 in the Universal Declaration of Human Rights (UDHR) (UNGA 1948); Article 18 and General Comment 22 in the International Covenant on Civil and Political Rights (ICCPR), and the 1981 Declaration on the Elimination of All Forms of Intolerance and of Discrimination Based on Religion or Belief.

FoRB is further enshrined in several regional or continental documents and protocols, with varying definitions and mechanisms as different Human Rights Conventions and Charters, one of which is Article 8 of the African Charter on Human and Peoples' Rights (African Union 1981 [2016]).

## **2 Background**

Nigeria is an African nation signatory to the above-mentioned international conventions and has also aligned with the legal instruments for the protection of religious freedom at all levels. Article 18 of the Universal Declaration of Human Rights and Article 8 of the African Charter on Human and People's Rights are entrenched in the Constitution of the Federal Republic of Nigeria. Section 10 of the Constitution states that 'The Government of the Federation or of a State shall not adopt any religion as State Religion' and Section 38 provides that:

- (i) Every person shall be entitled to freedom of thought, conscience and religion, including freedom to change his religion or belief, and freedom (either alone or in community with others, and in public or in private) to manifest and propagate his religion or belief in worship, teaching, practice and observance.
  - (ii) No person attending any place of education shall be required to receive religious instruction or to take part in or attend any religious ceremony or observance if such instruction, ceremony or observance relates to a religion other than his own, or religion not approved by his parent or guardian.
  - (iii) No religious community or denomination shall be prevented from providing religious instruction for pupils of that community or denomination in any place of education maintained wholly by that community or denomination.
- (Constitution of the Federal Republic of Nigeria 1999, Section 38)

But despite the legal provisions and realities, what is seen in Nigeria today reflects a global picture of violations of religious rights (Rothfuss and Yakubu 2012). Religious crises in Nigeria, with their associated destruction of lives and properties (Ayantayo 2011; Sulaiman 2016; Jegede 2019), are not only increasing but becoming an intergenerational phenomenon. A report by the Pew Research Center (2017) rated Nigeria alongside Pakistan, India, Egypt, and Russia as a country where the highest overall levels of restrictions against FoRB are found. There is no nation in the world that has such a large proportion of the predominant religions, with Christians (48.1 per cent) and Muslims (50 per cent) totalling over 140 million (Onaiyekan 2009; Gramlich 2020). Efforts to live together in peace are often underrated. The activities of the Islamic extremist group Boko Haram, which opposes the secular status of the country, have further displaced millions of people and claimed many lives and properties.

Religious conflicts and insecurity have been endemic in Nigeria during the last two decades, which has threatened religious freedom, peaceful coexistence, and national security (Rothfuss and Yakubu 2012; Ushe 2015). Finding lasting solutions to the increasing rates of violent religious crises

that have impeded progress in all spheres of human endeavours in the country is of vast importance (Jegade 2019).

Poverty and injustice caused by corruption are also found to weaken social solidarity or coexistence, and keep reawakening social hatred, radicalism, and violence (Sampson 2012; Ugorji 2016; Jegede 2019). In this sense, violence involving religious groups is not always caused by religious issues, but can be sparked by issues connected to ethnicity, crime, land, politics (Olojo 2014), and political economy, which underscores the relevance of this study.

### 2.1 Tertiary education and scholarships

Higher education or post-secondary education is considered as a third level of formal learning or tertiary education, which may vary in nomenclature or structure from one country to the other. It can be described as a level of education where the human capital of a state or nation is emphasised. Access to this level of education is globally considered to be a right of citizens, backed up by Article 13 of the United Nations International Covenant on Economic, Social and Cultural Rights (ICESCR). Article 13 states that 'higher education shall be made equally accessible to all, on the basis of capacity, by every appropriate means, and in particular by the progressive introduction of free education' (OHCHR 1966a). This has also been domesticated globally with various policies to ensure its effectiveness and efficiency.

In Nigeria, Section 8 of the National Policy on Education describes tertiary education as the post-secondary education in universities, colleges of education, polytechnics, and monotechnics among others. The educational goal is to contribute to national advancement through high-level relevant intellectual capability development of individuals to understand and appreciate their local and external environments for self-reliance and national unity (NERDC 2004: Section 28, c–d).

However, higher education is known to require huge funds to be effective (James 2012). This is the reason why governments across the world mobilise external financial support in the form of scholarships, grants, endowments, etc. from the private sector for the sustainable development of tertiary education. A scholarship is a path to make higher education attainable and affordable for students in a context where the government's social spending does not support the funding of affordable higher education for students. Scholarships open doors to higher education for indigent students who might be indebted or completely disenfranchised for lack of required funds. A scholarship's impact can include reducing the financial burden of the rising costs of a college education, and allowing a student to find more time and energy to focus on studies rather than other distracting engagements, such as part-time work. It can be a part of or fully support the financial commitment that a student requires to acquire higher education in an institution. In all, scholarships enhance effective inclusion and sustainable development on the education landscape.

Scholarships can further be an instrument allowing developing countries to build human capital for development within science and technology through higher education. With the increased trade and investments in the global economy, the skill-based activities that are dependent on a large pool

of qualified human capital, which can be achieved by higher education, are also on high demand. In effect higher education is a strategic driving force of sustainable economic development. It has also become a widely accepted fact that higher education, for instance, has been critical to the emergence of India's global knowledge economy (Agarwal 2010).

Therefore, it is assumed that with the increased religious consciousness of students of tertiary institutions and the critical role of higher education in advancing sustainable development, the relevance of a peaceful atmosphere that enables FoRB cannot be overemphasised.

## 2.2 Oyo State scholarship scheme

OYSLGSS is a unique programme that is sponsored by a collective effort of all the 33 local government areas (LGAs) in Oyo State, and it operates at the First Technical University in Ibadan. The purpose of the scheme is to support qualified young citizens of Oyo State to access quality tertiary education. It was deliberately structured to enhance equitable tertiary educational development in the state and to sustainably develop the growth of the young state-owned universities. The scheme gives equal opportunity to all 33 LGAs by making it mandatory for every LGA to sponsor at least five students from their respective LGA. It enables the Ministry of Local Government and the Technical University to mobilise funds for upfront full payment and it has been an annual exercise for the past three academic sessions. The scheme is in line with the national policy on education by the Nigerian Educational Research and Development Council (NERDC) that encourages universities and other tertiary institutions to explore other sources of funding to supplement government funding (NERDC: Section 62).

The OYSLGSS mandate is to enhance higher education and sustainable development of Oyo State and Nigeria. Its operations have been criticised by some citizens and non-governmental organisations (NGOs) for being politically and religiously biased. The mechanisms and parameters of generating the lists of scholarship awardees are not so clear to the public, and the protest letters and petitions by NGOs to the governors and commissioners on the perceived religious inequality of participation and scholarship awardees in the scheme have generated concern within the state.

For instance, the Movement for Better Oyo State, a socio-political NGO that is non-partisan, was said to be established by a group of youths to serve as a development watchdog in the state. The objection raised by this NGO was on the ratio 9:1 Muslim to Christian disparity in the nominees from Irepo LGA for the scholarship screening. Though the issue that was flagged was not reversed, it was learnt that it caught the attention of some top functionaries, and this led to the inclusion of not less than three other Christian nominees to participate in the exercise that year.

The protest against the nomination for the scheme as the 'benevolence' of the chairmen of most LGAs was the objection of the Irekari Group, a socio-political grass-roots organisation. There was no tangible response that this petition attracted in terms of review of the concerned list but was said to be noted for action. Yet this study can identify significant participants that query the transparency of the nomination process of the scheme.

Though the OYSLGSS is not a concept, its operations could have religious implications and possibly trigger a religious crisis if they are not properly managed, which will be touched upon in section 4. The issues around non-inclusion regarding the scheme's activities that have been raised by NGOs and some parents are also generating public interest and catching the attention of appropriate authorities and development stakeholders.

### 3 Methodology

In order to answer the research questions and establish a good understanding of the facts and dimensions of the perceptions and experiences of the research participants, a non-positivist research approach was adopted. A non-positivist research approach is the type that does not start with a hypothesis or deductively test a theory as peculiar to positivism research approaches (Saunders *et al.* 1997: 71). This choice was made because it is a flexible research process through which the subjects can express their perspectives and positions on specific social realities.

A mix of qualitative and quantitative research methods was further utilised to make the findings more robust than if limited to only one of the two. This gave the opportunity to use different methods for different purposes (*ibid.*). It was possible for the researchers to use semi-structured interviews and focus group discussions (FGDs) to further illuminate or investigate issues identified from the use of questionnaires and extract non-verbal data from the nuances in between (see Table 3.1). Employing this mix also afforded the advantage of using the strength of a method to strengthen the weakness of the other in triangulation, to verify and confirm the observations. This enhanced the data validation through comparison for verification from various perspectives.

To be able to access robust data, the targeted population for this study included officials from the Ministries of Education, Local Government, and Information, First Technical University (where the scholarship is operational), scholarship awardees of the scheme, parents, opinion leaders, political/government functionaries, unsuccessful scholarship applicants, civil society organisations (CSOs), development practitioners, and religious leaders across LGAs in Oyo State (no less than two LGAs from each of the seven administrative zones of Oyo State were sampled for an even spread). The study population was accessed in a number of ways: some were officially sent letters by virtue of the offices they occupy, others were contacted through the university's stakeholder meetings held at the university during the matriculation ceremony for the 2019/20 session in February 2020, and most of the remainder were contacted through the snowballing approach by referrals. Identifying the students on campus was not a problem due to their identification cards and groupings. Most parents or guardians were contacted via the students or through a fellow parent, and other participants were contacted through community/civil society coalitions and religious groups.

Without considering a formal sample frame size or sampling a specific number of participants in a specified order, the selected were purposively (for interviews and FGDs) and randomly (for questionnaire administration) sampled as convenient. This choice was dependent on the ease of access to the sampled frame for population representation and adequate inclusion

within the control and efficiency of the study. The primary data was collected from the fieldwork across the seven geopolitical administrative zones of Oyo State with mixed data collection tools of questionnaire administration, protocol interviews, and FGDs with secondary data through documentary analysis.

A questionnaire is a structured interview (Saunders *et al.* 1997) designed to extract data from respondents in a manner where each research participant responds to the same set of questions in the same order. As a quantitative research tool, it is not very flexible, and respondents are limited to options of responses. However, the use hereof in this study, was firstly utilised as a result of the descriptive and explanatory nature of the research, and it was further based on the tool's ability to capture more participants in a short time, unlike the qualitative tools (*ibid.*). It was very useful in ensuring that essential data, like the characteristics of the respondents, was collected and for the avoidance of distortion or contamination of responses or information. We categorised the different types of respondent to use one of three questionnaires: type A for students of First Technical University, type B for parents/guardians/others, and type C for university/government staff (see Annexe 1). These questionnaires were either self-administered directly by the respondents or completed through an interviewer, as applicable and convenient for the study.

Interviews as purposeful discussions between two or more people (Kahn and Cannel 1957), were found to be a very useful tool to gather valid and reliable data that is relevant to the research questions and objectives. As a more explanatory social interaction between the researcher (interviewer) and respondent (interviewee), it was found to be flexible in order to further explore and understand the highlighted questions, concepts, and issues (Whitehead 2005). In this study, every discussion was guided by an interview protocol to manage time and minimise digressions. The majority of the interviewees were interviewed at their respective houses after work, some at their workplaces, and a few at recreation places. After a review of

**Table 3.1 Distribution of participants**

Serial no.	Participants' categories	No.	%	Engaged with questionnaire		Engaged in interview		Engaged in FGD	
1	Students	137	35	83	21%	16	4%	38	10%
2	Parents/guardians	78	20	32	8%	47	12%		
3	Civil servants/university staff	20	5	13	3%	7	2%		
4	Opinion/community leaders	66	17	12	3%	27	7%	27	7%
5	Politicians	39	10	15	4%	13	3%	11	3%
6	Religious leaders	40	10	11	3%	20	5%	9	2%
7	CSOs	12	3					12	3%
	<b>Total</b>	<b>392</b>	<b>100</b>	<b>165</b>	<b>42%</b>	<b>130</b>	<b>33%</b>	<b>97</b>	<b>25%</b>

Source: Field survey, 2020.

the consent procedure and collection of demographic data, it was ensured that all the interviewees felt at ease, had a good understanding of the choice of language in which to respond (English, local, or dialect), and any judgemental process or pressure was avoided to enable free expression. None of the interview sessions lasted less than half an hour and, in some cases, it took up to an hour or more depending on the versatility and willingness of the participants.

An FGD is a naturalistic form of qualitative research in which a group of people are asked about their attitude towards given concepts, ideas, and historical facts (Krueger and Casey 2000). The design of FGDs is to establish good conversations, with ebbs and flows from general to specific subjects, in a relaxed setting where participants/discussants tell personal stories, disagree, interrupt, and contradict themselves for greater insights. The choice of FGDs relies on eliciting verbal and non-verbal expressions of the discussants and stimulating spontaneity of responses. The number of participants per group ranged from five to nine, and the questions asked were about research-related subjects, which were discussed interactively among the group members. The fluidity of responses to the questions was high and diverse issues were freely discussed, in order to come up with answers based on the perceptions and experiences of the participants. Data extraction was also facilitated by the dynamics of responses and the researcher was able to see how it 'all fits together' as expressed by Duncan and Marotz-Baden (1999), and to interpret and document.

There was a need for anonymity to protect personal or political images that exist, and most civil servants preferred the questionnaire instead of being interviewed due to time constraints and for anonymity in defence of their career/job perhaps, since their comments would not please those in power/government. Many of the participants of this study declined being recorded and having pictures taken of them, claiming that because religion is volatile they wanted to avoid debates or discussions that are religiously inclined. Apart from religious matters being perceived as private, this may be interpreted as an indication that in the society where OYSLGSS operates (Oyo State/Nigeria), there may be freedom of worship, but most people may also not feel safe or comfortable to freely discuss or express their perceptions on religious issues.

Secondary data was sourced from reference documents that provided useful information from which the research questions were also explored. Among these are correspondences sent to some candidates, written petitions from NGOs, university records (data on scholarship awardees), and media chats. The researchers could access most of the documents on the spot where they were found and made copies of a few, as allowed by the sources. This helped in getting the actual numbers of scholarship awardees and associated data from university records. It also enabled the exploration of one of the petitions identified and substantiated some of the findings from the other methods.

The data collected was analysed using descriptive statistical tools, including frequency distribution tables, charts, and cross tabulation. This was done in a systematic progression that ordered the data as descriptive units for interpretation and information synthesis to answer the research

questions, address the objectives of the study, and draw appropriate conclusions and recommendations.

### 3.1 Study area

The study area is Oyo State, a constituent state of the nation of Nigeria. Before the state creation exercise of 1976 in Nigeria, it was known to be part of the Old-Western region of the country. Old Oyo state was one of the three states (Oyo, Ondo, and Ogun) created from the Old-Western region in 1976. In 1991, Osun state was carved out of the Old Oyo state and the remainder is what is now known as Oyo State. Ibadan, the capital of the Old-Western region remains the capital of the present Oyo State and the state covers about 27,460km<sup>2</sup> of land mass bounded by Ogun, Kwara, and Osun states in Nigeria and the Republic of Benin.

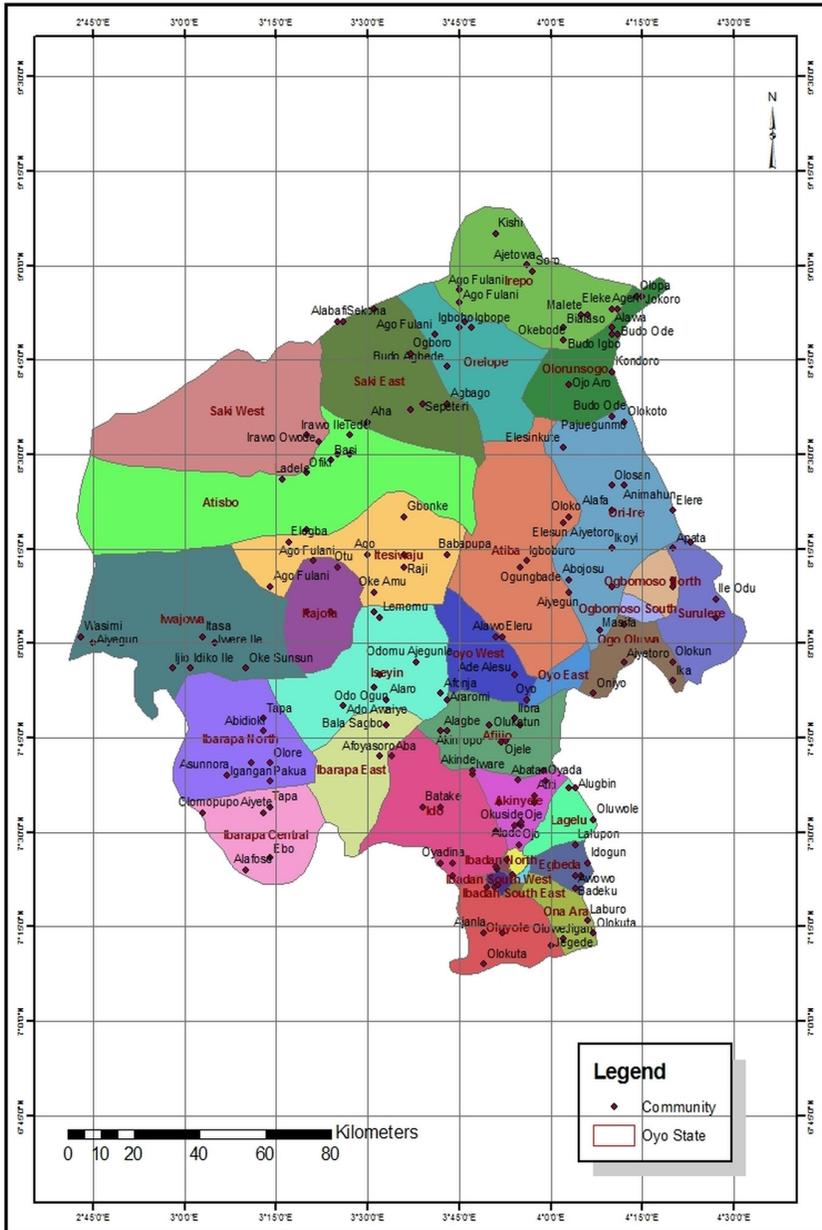
According to the National Population Census (NPC 2006), Oyo State has a population of 5,591,589 and a population density of 204 (Aderounmu 2013). It is one of the most urbanised states in the federation with agriculture as the mainstay of its economy. Oyo State is composed of 33 LGAs (see Table 3.2 and Figure 3.1) and it has a democratically elected governor as the chief executive of the state, a 32-member legislative House of Assembly and a judiciary arm as obtained in the democracy of the nation.

**Table 3.2 Oyo State political delineation and educational institutions**

Serial no.	Item	Quantity
1	Senatorial districts of Oyo North, Oyo Central, and Oyo South	3
2	Federal constituencies	14
3	State constituencies	32
4	LGAs	33
5	Public primary schools,	1,576
6	Public secondary schools	969
7	Colleges of nursing and midwifery	2
8	Special schools for persons with disabilities	4
9	College of health technology	1
10	College of agriculture	1
11	Technical colleges	5
12	Colleges of education	2
13	Polytechnics	3
14	Universities	2
15	Private institutions (elementary to university levels)	Many

Source: Fieldwork, 2019 and **Oyo State website**.

Figure 3.1 Map of Oyo State, Nigeria, showing the 33 LGAs



Source: Aderounmu (2013). © Procon Team, re-used with permission.

In Oyo State, both Christian and Muslim missionaries have established multiple schools, and education has been a cardinal programme of every government because it is seen as a heritage from the Old-Western region and the citizens see it as their legacy. Apart from the landmark experience of the free education programme of the Old-Western regional government, bursary and scholarship financing (local and foreign) have been a recurrent

aspect within the annual budget of successive administrations. The bursary awards could at times be for all citizens of Oyo State in tertiary institutions in Nigeria or for those pursuing selected courses such as law or medicine. Scholarships are often for citizens studying abroad or in exceptional situations at the discretion of the governor.

#### **4 Ethnicity and religion in Oyo State**

Oyo State mainly comprises the Yoruba ethnic group and settlers from other parts of Nigeria and abroad. Like the rest of Nigeria, Oyo State is a multi-religious setting with Christianity, Islam, and Traditional Religion more prominent than multiple other religious minority groups. Most of the indigenous Yoruba people of Oyo State are found within Christianity, Islam, and Traditional Religion, but the majority of settlers from Northern Nigeria are Muslims and those from Eastern Region and the middle region of the country are predominantly Christians.

From its creation in 1976 until the 1980s, Oyo State enjoyed a relatively peaceful interfaith coexistence, but since then FoRB has been challenged from time to time, resulting in intra- and inter-religious crises. These cases of religious intolerance and conflicts have not only disrupted the public peace and education but also claimed lives and destroyed valuable properties.

At the University of Ibadan, the existence of a standing cross that could be viewed from a mosque caused serious inter-religious disharmony between the Muslims and Christians within the campus and all over Nigeria (Hackett 1999). There are also records of religious conflicts at masquerade festivals at different times in Ibadan, Kisi, and other communities in Oyo State (*Daily Post* 2017; *Inside Oyo* 2017). The tradition that forbids women to see the Oloolu masquerade in Ibadan concerns other religious groups and at times disenfranchises them of their right to FoRB. According to tradition, the Oloolu move round the community during the annual Egungun (masquerade) festival, and so for the duration female citizens cannot freely travel to their respective religious engagements. The constant violence between the Muslims and Egungun worshippers in Kisi has been described as a mirror of the discrimination, accumulated grievances, and tensions among religious groups in the community in general (Abegunde *et al.* 2019).

One incident in 2003 strained interfaith relationships across Oyo State. It was caused by Muslim fundamentalists who insisted that Muslim girls wear hijab, contrary to the approved school uniform in all schools (including those that were established by Christian missionaries) in Oyo State. This situation resulted in other religions encouraging their girls to also wear religious robes to school.

*There was no official statement made public on how the issue was handled or resolved but about a year later, the state government massively funded the establishment of Muslim secondary schools in many communities across the state.*

(Renowned Ibadan politician and elderstatesman, age 82;

one-to-one interview, at his Ikolaba house, Ibadan, 10 March 2020)

The issue of Muslim girls wearing hijab in schools triggered another religious crisis at the International School Ibadan (ISI), University of Ibadan on 12 November 2018, when Christians and other traditional religions insisted that religious expression should be exhibited only at home and not be mixed with school education (Adeyemi and Agboluaje 2018). The Muslim parents alleged the school was discriminating against the Muslim girls, but the authorities claimed that the idea of hijab negates the section of the school's constitution that guides dressing, since the school was established in 1963 as a private property of the University of Ibadan (UCJ 2018). The Board of Governors and management engaged the Parent Teacher Association (PTA) to end lessons by 1pm. Actions already made by the management to ease the practice of Islam include arranging transportation to Jumat for Friday prayers and providing special meals during Ramadan. But following a series of meetings it was agreed that while the dialogue on the matter continues, the school authority should stand firm on its principles and enforce the school rules, ensure that class allocations would not segregate the students, reinstate the dress code and include a sample of a sown uniform in a newsletter, and emphasise sanctions (Sahara Reporters 2018; Adeyemi and Agboluaje 2018). But the matter was later taken to court by the aggrieved Muslims and the case is ongoing.

The Iseyin community in Oyo State is known for the *Oro* festival, among other traditional celebrations. Similar to the above-mentioned Oloolu masquerade in Ibadan, the tradition is that during the seven-day *Oro* festival, a curfew is imposed<sup>2</sup> on women in the community to restrict them from seeing the *Oro* priest who moves round the town blaring a whistle to scare women. Some Muslims approached the court of law in the state for an injunction to prevent the adherents of *Oro* from celebrating their annual festival, planned for 22 September 2019, and this action further triggered religious dissonance between the *Oro* worshippers (of traditional religion) and Muslims (Azuh 2019).

While significant ethno-religious crises may not have existed since the creation of Oyo State, most of the violent conflicts on record are inter-religious. It is noteworthy that most of these conflicts were addressed via peace-building dialogue and alternative dispute resolution approaches that are inconclusive or only appeal to the victims to allow peace. Many of the litigations have been settled by the court and a few are still pending (*Vanguard* 2019). Of course, lives lost can never be regained; so far, no deterrents have been identified nor any case of compensation or damage paid to a religious group for destroyed properties or the like. One concern here is the effectiveness of these approaches, with the reoccurrences of such conflicts, particularly those of the same dimension as in Sepeteri (Ajayi 2013), Saki (Frontpage 2020), Kisi, and Ibadan. The current situation in Oyo State is relatively peaceful but not without risks.

## 5 Findings and discussions

### 5.1 The integration of FoRB in the operations of the scheme

There are four main stages for selecting potential scholarship awardees: eligibility; nomination/selection of candidates; ranking examination; and award of scholarship/admission. On the part of the OYSLGSS management/

administrators, it is observed that there is a belief that the scheme gives equal opportunity to everyone, as per the nation's constitution.

#### Eligibility

Apart from being a citizen of Oyo State, a candidate must not have more than two sittings and have at least five O Level Credit passes (including English and Mathematics) in subjects relevant to the university course of interest. He/she must also have obtained the required scores for university admission from the Unified Tertiary Matriculation Examination (UTME) conducted by the Joint Admissions and Matriculation Board (JAMB). Candidates must be presented by his/her LGA to participate in the screening process.

#### Nomination/selection of candidates

The selection of eligible candidates is narrowed to a political/community ward level in most of the LGAs, which is presented by the local government to the scholarship scheme administrator. The candidates then have to write a ranking examination from which at least five candidates are selected for the award.

Considering the eligibility stage, the findings of the study reveal that most people are not aware of when and how the nomination/pre-exam stage is held. About 39 per cent (153) of the participants knew about the scheme; of whom 67 (44 per cent) learned of it through politicians, 71 (46 per cent) through current scholarship awardees, and only 15 (10 per cent) learned about it through civil servants/university staff. Most scholarship awardees who were engaged in the study claimed that they were only informed about their nominations by their parents/relations, had no prior knowledge of the scheme, and did not fill in an official application form. The interviews revealed that in a few LGAs, such as Iwajowa, Ibarapa East, Atisbo, Ogbomosho South, Akinyele, and Afijio, the local government management discretionally tried to contact some stakeholders, and there was no public announcement on the call for applications to enable interested candidates (regardless of their religious affiliation, state of physical ability, and gender) to be informed of the opportunity of the scheme.

According to the majority of the participants (about 67 per cent), only the 'privileged ones' – those that by virtue of either their position in politics or as a government official or their social status has something to do with the scheme or the opinion/community/religious leaders – heard about the opportunity of the scheme by virtue of their good fortune. The participants' perception is that the information can or will always flow from the 'privileged ones', who are likely to be members of the religious groups to which they belong.

*I am sure of what I am saying in this Ibadan South-East. Most scholarship awardees have been Muslims which is the Chairman's religion and you say there is no underlining factor. We may not rule out.<sup>3</sup>*

(Opinion leader, octogenarian, and traditional chief; one-to-one interview, at Mapo Hall, Ibadan, 11 March 2020)

The study reveals that the ratification of those who make the ranking examinations list is exclusively at the discretion or approval of the local government chairman or anyone who acts in that capacity.

A petition from an NGO to the state governor on such marginalisation alleged that Islam, as the religion of the ruling party, chairman, and the head of Local Government Administration, was favoured over Christianity and Traditional Religion in the Irepo LGA.

*Out of the five Christian candidates whose credentials were submitted to the local government secretariat for nomination, four of them with the best UTME grades (a prerequisite for nomination) were delisted. The only reason we could find for this action is not belonging to Islam, a religion that is the majority in the LGA. Not until this action was petitioned at the state level by an NGO that the four candidates were allowed to write the exam.*

(Petty trader, age 56, and mother of one of the candidates whose name was formerly delisted in Irepo LGA; FGD at Laha, Kisi, 23 March 2020)

*It is a known fact within this local government [LG] that the post of an LG Chairman, traditional ruler, and community development organisation's leaders must be from a particular religion that is believed to be dominant locally: there is no fairness, no regard for competence – the same goes for this scholarship you mentioned here. How will there be true development.*

(Retired public/civil servant and former Commissioner in his 70s, one-to-one interview at Ibadan, 10 March 2020)

*There are LGAs in Oyo State, where the 'unwritten norm' that a particular religion must lead or dominate in every activity at the expense of competence, excellence, and fairness operates... this will lead us nowhere... check out Saki West, Ogbomoso South, Oriire, Irepo, Ibarapa North, Afijio, and the like... we should learn to respect competence and quality and the government has a duty to encourage this.*

(Opinion leader, octogenarian, and traditional chief, one-to-one interview at Mapo Hall, Ibadan, 11 March 2020)

Fifty-four per cent of participants who engaged in the FGDs and 37 per cent of those who engaged in the interviews acknowledged that the nomination stage has been the most criticised aspect of the scholarship operation within their respective LGAs.

#### Ranking examination

The conduct of the ranking examinations for nominated candidates is the responsibility of the respective university's management. Findings show that the examinations conducted so far have been transparent in conduct and standardised. Some candidates who attempted the examination but did not make it to the final list also acknowledged the fairness of the exercise.

As there were no cases of any form of favouritism for candidates from a particular religious denomination during the examination, candidates were said to have been grouped on the basis of their LGA, and not by religion. Most respondents who have attempted the examination described it as having a level playing ground without discrimination. None of the other respondents observed any religious sentiments, discrimination, or coercion concerning the conduct of the examination.

#### Award of scholarship/admission

The final approval of the five candidates (at least) from each of the 33 LGAs to be selected as scholarship awardees and awarded the scholarships is carried out by the Oyo State Ministry of Local Government, based on merit. But we were told about a case where a candidate from Irepo LGA, who was initially congratulated by the university (the examiner) to have passed the ranking examination, but later was denied the scholarship offer by the ministry without any notification or reason behind the credibility of this process. His nomination generated controversy, in terms of being a non-Muslim but a Christian from Irepo LGA. The candidate said:

*I had earlier been congratulated to have passed the exam, but when I went to the LGA Secretariat to collect my letter of offer it was discovered that my name had been replaced with someone else from a different religion [Islam] considered dominant within the LGA... All efforts to know why or rectify the situation were futile... it is sad that we are endangered religious group in our indigenous home community.*

(Male, age 18, from Kisi, one-to-one interview at Ogbomoso, 22 March 2020)

Another participant who claimed to have been following the case said:

*Religious foul play will always be suspected in Irepo LGA because of the intolerance experienced from Muslims to Christians and members of the Traditional Religion groups in the area.*

(Civil servant, male, age 46, one-to-one interview at the State Secretariat, Agodi, Ibadan, 10 March 2020)

This suspicion might also be based on the antecedents of the respective LGA with records of religious crisis and discrimination, as in the case of Kisi, the seat of the Irepo LGA. For instance, Abegunde *et al.* (2019) recounted that in 1986, Christians in Kisi were attacked by Muslims for passing a major road by the Central Mosque in the heart of the town during an annual Christmas Eve procession; in 1988, the town witnessed bloodletting clashes when Egungun worshippers were attacked by one Alfa Lati and his *Omo Ile Keu* (Quranic Students) at Atipa suburb for beating *Bata* (traditional conga drum), and during their festival carnival; and in 2003, the school hijab crisis mentioned above occurred.

*What I have seen for more than three decades as an opinion leader in Kisi, I can authoritatively say that religious affiliation has become*

*the most critical determinant of one's relevance in the scheme of things in this community.... It's only here that I see a federal health facility named after a particular religion [Muslim hospital] in a secular state where other religion faithful pay taxes with which the same facility is sustained. The last election of Executive Officers of Nigerian Union of Teachers Irepo LGA Chapter witnessed an open declaration by Muslims [as a dominant religion] that the Chairmanship of the chapter is not for non-Muslims. Since 1998, Kisi Students' Association has not really recovered from the religious crisis that led to the emergence of Christian Students' Association... you either belong to the dominant religion, which is Islam, or you accept to be a stooge in their interest. So how do I believe that they are not applying the same religion mentality in this scholarship scheme.*

(Community leader, degree holder, and politician, age 68, one-to-one interview at his Kisi house, 2 May 2020)

In view of such issues, the assertion that 'religion plays a prominent role in the socio-political life of Kisi to the extent that you may not be able to hold any political post or traditional stool without playing the religious card' (Abegunde *et al.* 2019: 5) may not be out of place. You play the 'religious card' by appealing to the religious sentiments of the majority.

Since religious discrimination can directly affect access to the constitutional rights of conscience and association as citizens, the 'majority takes all syndrome' under the guise that democracy is a game of numbers, also suggests that members of the dominant religion in an LGA can discriminatorily impose their wish regarding nominations for the scholarship process on other religions at will.

*We Muslims are in the majority in this LGA, so I don't see why we should not be taken [sic] the largest share of everything from the government... we are in democracy.*

(Middle-aged Muslim trader and community mobiliser, FGD at Isale-Taba, Saki, 26 March 2020)

The study found that most participants considered the examination to be well conducted, but that the final selection is not transparent enough.

*Our experience with this scholarship scheme has shown that the final selection is not completely on merit. How will you explain situations here where candidates got telephone messages that they passed and later it was their colleagues who never had such message that were given the scholarship... where is the sincerity?*

(Olu Ajao, age 58, farmer and volunteer with civil society organisations, interview, at Aremo Ibadan, 9 March 2020)

## 5.2 Factors responsible for the current perceptions of FoRB integration in the scheme

One of the factors identified from this study as being pivotal for the perceptions of FoRB integration within the scheme, is the low level of

awareness about it, because of the obvious lack of publicity for applications/nominations at the beginning of each edition of the scheme. The below average number of participants who were aware of the scheme (39 per cent) could be an indication of low publicity. Some claimed to have heard about the scheme only by coincidence: one interviewee said, 'I just overheard someone say it at a bar' (Oseni Rasaan, age 62, from Isale-Akao, Igangan, one-to-one interview at Igangan, 5 May 2020). This indicates that the lack of clearly defined and open channels of communication that adequately informs potential scholarship awardees and enables more indigenous people to participate on an equitable platform is an issue for attention.

Hoarding information about the scheme and the nomination process for undue advantage is identified as another factor that informed the perceptions about the OYSLGSS, which could be inferred from the observation that 95 of the 153 respondents who knew of the scheme claimed to have heard about it as discrete/confidential information from politicians or government officials. Upon interrogation, some opined that information on the scheme may be deliberately gagged to restrict it to either political loyalists or loved ones, which could include religious colleagues of those that had the information. These assertions of favouritism are a subject for further research, but its anti-FoRB implications that it could disenfranchise others from being aware of the scheme is noteworthy.

Beyond seeing religion as a private matter, the idea of avoiding commenting on any issue that has a religious taint for safety reasons indicates that FoRB is not well applied in the state. This degree of FoRB shows that most participants do not feel they can freely express their subjective views on issues that have certain religious or belief inclinations. As much as the security status of a society determines how FoRB can be fairly implemented, feeling insecure to freely discuss perceptions of religious issues is a factor that indicates people's perceptions about how FoRB is integrated within the OYSLGSS.

Politicisation of religion is another factor identified for the prevailing FoRB implications of the scheme. The process of nominations for the scholarship in some LGAs where the dominant religion must be imposed on the public and share with or give opportunity(ies) to other religions at will by virtue of being the majority betrays fairness and may lead to a crisis. In this case the government is obliged to take proactive steps that prevent further occurrences (UNGA 1948; OHCHR 1966b).

There was also inconsistency in the ranking examination, with the final admission lists of scholarship awardees not being appropriately communicated. Most sympathetic is the case of the previously mentioned candidate who had been congratulated on passing the examination and later found out that his name had been replaced with a name from another religious denomination on the final admission list. The candidate stated:

*All I was told by the officials there was that this was how the list was sent from the coordinating ministry at the state level and there is nothing anyone can do about it.*

(Male, age 18, from Kisi, one-to-one interview at Ogbomoso, 22 March 2020)

The lack of correlation between the examination and the award list does not question the essence of such an examination, but it gives room for all manner of suspicion and the particular substitution of a Christian candidate with a Muslim in Irepo LGA is obviously of FoRB concern. This kind of disconnect in the selection process of scholarship awardees demands a critical look with a 'policy lens'.

### 5.3 The policy and sustainable development implications

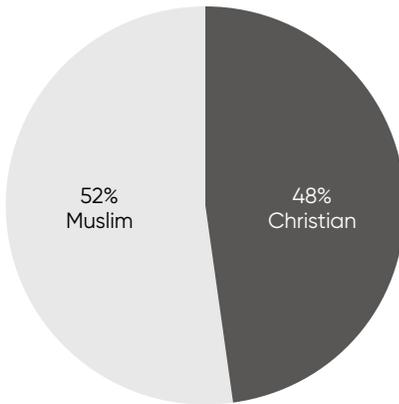
There is a general belief that the scholarship scheme policies operate under the statutory provisions of the Constitution of the Federal Republic of Nigeria, and it is therefore expected that the clauses on social inclusion, as it relates to gender, FoRB, and persons with disabilities are respected. From the study data, OYSLGSS was rated high in achieving the objective of supporting the citizens of the state to have tertiary education, but the observed or alleged religious favouritism, in such incidents that were petitioned, implies that the scheme is seen to be non-compliant with the provisions of the nation's constitution.

Though there seems to be no conscious or official attention given to religion at the stage of nomination for the ranking examination, the religious profile of candidates is mainly shared between the two major religions, Christianity and Islam. The average ratio of Christian to Muslim scholarship awardees of the OYSLGSS at the Tech-U so far is 48 per cent to 52 per cent (see Figure 3.2), with no scholarship awardees from any other religious group. This may not necessarily indicate that the minority religions were not likely to receive 'official' recognition, because from this study, there was no applicant to the scheme from indigenous religions identified who met the selection criteria but who was denied the award. However, having only Christians and Muslims without members of any other religion as scholarship awardees, suggests that considerations are most likely given to adherents of Islam and Christianity at the nomination stage. While this may not be deliberate, it could be a reflection of the dominance of Islam and Christianity over the indigenous religions in the study area, or the exclusion of minority religions from policy managements, or simply their low representation in politics and governance.

In relation to FoRB, one would expect to see other religious groups included apart from Christians and Muslims (Figure 3.2). However, it was found that the nomination process had been verbally questioned or petitioned by the LGAs (such as Irepo, Kajola, Ibadan South-East, Afijio, Saki West and Ibadan North-West) as not being religiously inclusive, indicating that the process may have loosely given room for religious favouritism as particularly claimed in the petition written to the governor on Irepo LGA (Adebisi 2019).

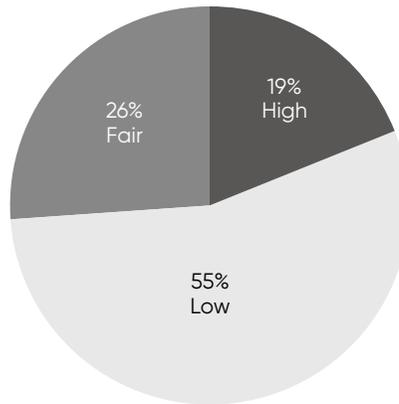
It is easy to see in Figure 3.3 that 55 per cent of participants rated FoRB integration in the scheme as low, despite there being a fair religious balance between accepted grantees (Figure 3.2). It is possible that their responses refer to the perceptions of the discriminating experiences during the nomination process, where the selection was not made open for all eligible candidates to apply. This means that the existing list of scholarship awardees (Figure 3.2) that emerged by the prevailing nomination or pre-exam process alone may not be fully adequate to assess the FoRB status

**Figure 3.2 The OYSLGSS scholarship awardees religion distribution**



Source: Field survey, 2020.

**Figure 3.3 Respondents' perceptions on FoRB in the OYSLGSS**

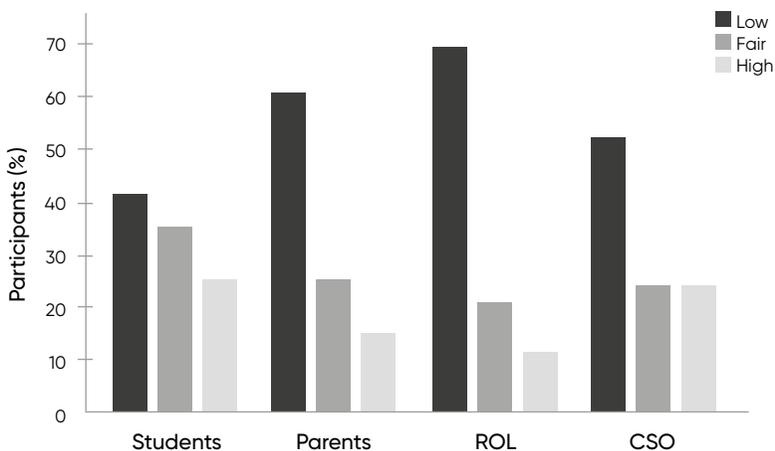


Source: Field survey, 2020.

of the scheme. It is also likely that perceptions are informed by the fact that only two religions are benefiting. The reflections on past experiences of residual religious sentiments and perceptions exhibited either in the form of religious discrimination or violent crises, might also be responsible for their responses.

Figure 3.4 shows that the perception of the student awardees, parents, religious/opinion leaders, and CSOs is that FoRB integration into the OYSLGSS is relatively low. This view is even stronger among the religious/opinion leaders that are assumed to be aware of any development within society. In further probing of what informed their perception, all of them could only refer to the experiences and news about the nomination process and the religious distribution of the existing scholarship awardees in

**Figure 3.4 Participants' group perceptions on FoRB in OYSLGSS**



Notes: ROL: religious and opinion leaders; CSO: civil society organisations.  
Source: Field survey, 2020.

their respective LGAs. Generally, when people's own religion is favoured, FoRB is found to be well integrated, a view that prevails significantly with the participants.

Primordial sentiments are also identified as dangerous factors influencing these wrong religious perceptions attached to the scholarship scheme. For instance, the perceptions of some Muslim participants in Kajola LGA that the last selection process of the scheme favoured Christians because they have more people represented among the elites turned out to be untrue because the data from the university shows that more Muslims from the LGA actually benefited from this exercise. Similarly, some members of the Christian Association of Nigeria in Afijio also believed that there is no religious fairness in the scheme since Muslims supposedly benefit more than other religions. But this claim also turned out to be unfounded because the data reflects that most scholarship awardees in Afijio LGA are Christians.

The identification of religious discrimination in some LGAs, raised by most participants of minority religions in their respective area (particularly those from Christianity and traditional religions), is recognised as a latent threat to the sustainability of the scholarship scheme. This is because the religious discrimination against non-dominant religious groups to appropriately have nominees participate in the ranking examination has been seen to be a form of discrimination that could also trigger crisis and retard the development of such areas. A respondent affirmed:

*Except if there comes an improved approach from the government, the existing process is influenced in our area by religious sentiments and this may truncate the programme.<sup>4</sup>*

(Secondary school teacher, female, one-to-one interview at Ogbomoso, 5 May 2020)

With various conceptions of merit, one of the highly contentious policy issues is having inclusive participation in higher education without conflict (James 2012). So, the implications of religious crisis that can engulf a system devoid of a proactive and contextual FoRB policy cannot be taken for granted. The formal social inclusion and integration of FoRB, disability, and gender provisions that is seen to be lacking in the scheme's operations needs conscious deliberate consideration.

However, the national policy on tertiary education empowers the JAMB to coordinate a UTME (Federal Republic of Nigeria 1989; NERDC: Section 28, c–d) that qualifies any candidate that meets the requirements to be offered admission to any tertiary institution in Nigeria. This study reveals that a comfortable pass in the UTME and O Level School Certificate Examination are prerequisites for the scholarship nomination, which complies with the national policy and JAMB Act (Federal Republic of Nigeria 1989). The 'cut-off' marks set for university admission and a minimum of five O Level Credit passes in the relevant subjects (including English and Mathematics), must be met by all candidates. Further, no candidates can be offered admission in more than one institution at a time. In the words of a parent interviewed,

*My child was denied the benefit of OYSLGSS after he was congratulated to have passed the ranking examination, because JAMB already offered him an admission to another institution and no single candidate can have more than one admission through the board.*

(Politician, age 61, from Ilora, one-to-one interview at Oyo, 24 February 2020)

This indicates that the OYSLGSS is not a standalone programme outside the national policy, and the guidelines for admission to tertiary institutions shall be required to continuously match the practices directed by national policy (NERDC: Section 28, c–d).

#### 5.4 Options for sustainable religious fairness and equality

As opined by James (2012), conceptions of equity in higher education revolve around ability, access, and selection on merit without any discrimination, where all people have the same opportunities. Seventy-six per cent of interviewees in the study advocated for the need to institutionalise an open, socially inclusive, and standardised application process, rather than nominations that may not be free from issues of religious sentiment and other types of social exclusion. The open process is believed to be a more transparent procedure based on merit and it could be monitored for sustainable religious fairness and equality.

The need for a value-based reorientation to educate, enlighten, and encourage religious tolerance as the most critical step towards establishing FoRB in each society, was identified by participants. The perception of religious intolerance noticed by participants in a few of the LGAs can undermine the purpose of the scheme and make it unsustainable if adequate attention is not given.

It is also noteworthy that about 80 per cent of the religious leaders who participated in this study hold that prayer is still the key to attain religious fairness and equality in any society.

*For me, I believe that to achieve a good religious balance in whatever we do in this country, we need serious prayers and divine intervention.*

(Pentecostal church pastor, age 56, FGD with religious leaders at Iseyin, 19 March 2020)

*It will be very difficult to have any fairness in religious matters if the evil spirits causing conflicts among us are not dealt with in prayers.*

(Female cleric of a spiritual church, age 67, FGD with religious leaders at Kosobo, 18 February 2020)

An Islamic scholar/cleric and member of League of Imam and Alfa, Oyo State said: ‘Everything we do in life demands prayer, and a peaceful relationship among us cannot be an exemption’ (FGD with religious leaders at Moniya, 8 March 2020). This situation implies an existing knowledge gap about FoRB among the religious leaders, which further underscores

the need for awareness and education on the concept of FoRB. The need to promote equality and better inclusion by increasing the number of scholarship awardees per LGA is another popular suggestion from a significant number of interviewees. While some suggested that having one scholarship awardee (not based on any religion affiliation) per ward would accommodate more people and probably include more religions, others opined that one scholarship awardee per ward could be a benchmark and even encourage the LGAs to do more.

An apolitical nomination process that gives equal slots of nominees to the majority religions (i.e. Islam and Christianity) is also identified as an option. If the nomination of candidates for the scholarship is done equally among the major religious groups that are often at loggerheads, without any political influence, probably a fairer and more stable process could be reached. But this is also seen by some respondents to have inter-/intra-religion discriminatory risks, which raises the question of how will some community wards not be short-changed? Be that as it may, the whole idea also excludes the traditional religions from the scheme, and will be against the principles of FoRB.

Though the high influence of the state on local government administrations is also recognised as a contributory factor to the existing selection process, most participants who engaged in interviews and FGDs opined that a policy of one scholarship awardee per LGA ward could ease the strain for equity and enhance FoRB, transparency, and fairness. In this case, each ward in the LGA would select their two best qualified candidates through an open and inclusive mechanism to go and participate in the ranking examination of the scheme and whoever has the highest score becomes the scholarship awardee by merit.

## **6 Conclusions and recommendations**

The overall goal of establishing the OYSLGSS is to enhance sustainable tertiary educational development in Oyo State and sustainably develop the growth of the young state-owned First Technical University, Ibadan. It is the first full scholarship scheme in Nigeria to be so well structured and to involve all local governments in the state to mandatorily sponsor at least five students to attend the university. Required funds are pooled from the local governments for upfront remittance to the university.

The pre-exam stage presents at least ten candidates from each LGA for the ranking examination. The conduct of the ranking examinations by the university has been of a standard quality devoid of any religious discrimination. OYSLGSS does not undermine the national policies on tertiary education as regards UTME and O Level certificates as prerequisites. A nomination process that gives equal slots of nominees to the majority religion can be discriminatory and counterproductive, but the idea of a scholarship awardee per LGA ward, based on merit, could ease the strain by increasing equity and fairness.

However, no formal document for any religious consideration or FoRB compliance model was identified in the scheme's operations: nomination is left to chance and discretion of the chairman/head of the LGAs – a situation which can encourage shades of favouritism and majoritarian discrimination. There is a low level of awareness about OYSLGSS and a

need to advance the advocacy and public awareness of its operations for a well-defined pre-exam selection stage that will be objectively inclusive without any political or religious sentiments.

Despite the good quality and conduct of the qualifying examination of the scheme, as informed by most of the respondents, the examination scores were never published and determination of the final list of successful candidates was not sufficiently transparent. FoRB is not well integrated into the scheme's operations due to alleged information hoarding regarding nomination of candidates and the domination of religious groups by the majority religions. As opined by Aderounmu (2014), getting on board any development engagement on the basis of religious sentiment can be catastrophic. The suspected abuse of office and the attempt to appease the powers 'that be' particularly identified by the political actors at the pre-exam stage of the selection process can undermine FoRB and the general sustainability of the scheme.

The lack of scholarship awardees from religions other than from Islam and Christianity could be a product of suspected discrimination by members of dominant religions during the nomination/pre-exam stage and calls for an appropriate and non-discriminatory approach or policy to make the scheme sustainable. In another view, this issue of having only Christian and Muslim scholarship awardees over the years could be further investigated. Perhaps other religions lacked interested/qualified candidates to participate in the scheme.

The high rate at which most informants avoided talking to the researchers on themes revolving around religion for its volatility, and how most that took part in interviews/FGDs sought anonymity, is significant to implicate their consciousness of the crisis that is latent in matters of religious discrimination or inequality. The desire for an increased number of scholarship awardees across each of the local government wards in equity is recognised as a possible improvement that will require a commitment of more funds. This suggests that no LGA will have less than ten scholarship awardees, which doubles the current five scholarship awardees per LGA. As this creates more chances for effective inclusion, it does not foreclose the need to make the processes more open and transparent.

As for all the issues mentioned above, the scheme deserves a deliberate policy enhancement that will be conscious of FoRB, without compromising merit for sustainability. The government is obliged to respect, protect, and promote human rights of which FoRB is a part (Special Rapporteur on Freedom of Religion or Belief 2011). So, the state and local governments need to show interest in challenging perceptions and incidence of discrimination in order not to undermine the long-term vision of the scheme among other developmental interventions. If the government does not act decisively on such vital sociocultural issues, it could imply that the government allows the circumstances to encourage politicisation and majoritarian manifestations against the principles of FoRB, as enshrined in the ICCPR Declaration of 1966. Such a strategic policy review could also prevent any gap that could make the scheme unsustainable or stain the profile of Oyo State as a 'pace-setting' state.

To create more inclusive participation, as for standard scholarship programmes, the application for OYSLGSS must be open to all eligible

candidates through an institutionalised, accessible, and standardised application process, which is based on merit and equity, and put in place by the authorities. This would address issues of religious sentiment and other social exclusory perceptions regarding the scheme and other activities in the state. The transparency of the entire process must be established by making public the results of the ranking examination and indicating that scholarship awardees are based on merit, to prevent any action suspected to be shrouded in the present method of operation.

Religious fairness and equality in the scheme can be promoted through an institutionalised inclusive monitoring and evaluation system that allows non-governmental and non-religious watchdogs to act on manipulation or any abuse of the process. Education, specific awareness-raising about FoRB, and advocacy intervention are required as critical steps to encouraging FoRB in Oyo State to have an effect on the scheme's operations in the interest of sustainable development. It will also be worthwhile to investigate the discrimination processes by the majority religion and the fate of other religions in developmental participation in relation to FoRB, with possible intervention support for strategic FoRB education and advocacy.

Further, research needs to be encouraged and supported on LGAs where there is an unwritten norm that endorses traditional and public positions for particular religions and disenfranchises others, and also on mobilising support for FoRB advocacy and capacity development interventions in Oyo State.

## Annexe 1 Questionnaires

### Type A

This questionnaire is designed to effect candid responses of the stakeholders on the Social Inclusiveness and Sustainability of the Oyo State Local Governments' Scholarship Scheme domiciled in the First Technical University, Ibadan. It is exclusively for research purposes to be treated with utmost anonymity for confidentiality.

- 1 Title of the respondent: Mr  Miss  Mrs  Others (specify) -----
- 2 Sex: Male  Female
- 3 Current Academic Level:                    300        200        100
- 4 Course of Study: -----
- 5 Local Govt. & State of Origin: -----
- 6 Religion Affiliation:  Islam  Christianity  Traditionalism  
 Others (Specify) -----
- 7 Age range:  15–24 years         25 years above
- 8 Are you aware of OSLGSS operating in First TechU?  Yes  No
- 9 If yes to (8) above, how did you get to know of OSLGSS?  
 News Media                     Friends                     Politician  Civil Servant  
 Faith Organisation  Others (specify) -----
- 10 Are you a scholarship awardee of OSLGSS?  Yes  No
- 11 Did you write any application to OSLGSS?  Yes  No
- 12 Did you participate in any exam to qualify for OSLGSS?  Yes  No
- 13 Did you get to know your score in the exam?  Yes  No
- 14 How were you informed of the final list of the scholarship?  
 Internet/School Website         Local Govt. Secretariat  Politician  
 Others (specify) -----
- 15 Which area do you notice a non-inclusion/inequality?  Gender  
 Religion  physically challenged  Others (specify) -----
- 16 Rate the freedom of religion in the scholarship scheme  
 Very Low  Low  High  Very High
- 17 Do you notice any non-indigenes of Oyo State benefiting the scholarship?  Yes  No
- 18 Can you say that the selection process was strictly on merit?  
 Yes  No
- 19 In your own view, are the scholarship awardees really indigent?  
 Most  Average  Few
- 20 Which of these is highly represented in your department or level?  
 Islam  Christianity  Traditionalism  Others (Specify) -----

**Type B**

This questionnaire is designed to effect candid responses of the stakeholders on the Social Inclusiveness and Sustainability of the Oyo State Local Governments' Scholarship Scheme domiciled in the First Technical University, Ibadan. It is exclusively for research purposes to be treated with utmost anonymity for confidentiality.

- 1 Title of the respondent: Mr  Mrs  Others (specify) -----
- 2 Sex: Male  Female
- 3 Your Highest Education qualification:  
 Degree  Diploma  School Cert./Primary  No Formal Education
- 4 Occupation: Civil Servant  Farmer  Petty Trader Artisan   
Pensioner  Contractor  Other (Specify) -----
- 5 Do you participate in partisan politics? Yes  No
- 6 Local Govt./State of Origin: -----
- 7 Religion Affiliation:  Islam  Christianity  Traditionalism  
 Others (Specify) -----
- 8 Are you aware of OSLGSS operating in First TechU?  Yes  No
- 9 If yes in to the above, how did you get to know of OSLGSS?  
 News Media  Friends  Politician  Civil Servant  
 Faith Organisation  Others (specify) -----
- 10 Has your child/ward tried to benefit from OSLGSS?  Yes  No
- 11 Did s/he write any application to OSLGSS?  Yes  No
- 12 Did s/he participate in any exam to qualify for OSLGSS?  Yes  No
- 13 Did you get to know his/her score in the exam?  Yes  No
- 14 How were you informed of final list of the scholarship?  
 Internet/School Website  Local Govt. Secretariat  Politician  
 Others (specify) -----
- 15 Which area do you notice a non-inclusion/inequality?  Gender  
 Religion  physically challenged  Others (specify) -----
- 16 Rate the freedom of religion in the scholarship scheme  
 Very Low  Low  High  Very High
- 17 Can you say that the selection process was strictly on merit?  
 Yes  No
- 18 In your own view, are the scholarship awardees really indigent?  
 Most  Average  Few

### Type C

This questionnaire is designed to effect candid responses of the stakeholders on the Social Inclusiveness and Sustainability of the Oyo State Local Governments' Scholarship Scheme domiciled in the First Technical University, Ibadan. It is exclusively for research to be treated with utmost anonymity for confidentiality.

- 1 Title of the respondent: Mr  Mrs  Others (specify) -----
- 2 Sex: Male  Female
- 3 Your Designation -----
- 4 Religion Affiliation:  Islam  Christianity  Traditionalism  
 Others (Specify) -----
- 5 Which of these ministries are officially involved in the administration of the scheme?  
 Education  Local Govt.  Information  Social Welfare  Youth
- 6 How is the scheme funded by the Local Governments?  
 Allocations  IGR
- 7 How open is the application to eligible candidates?  
 Low  fair  High
- 8 Can you say that the selection process was strictly on merit?  
 Yes  No
- 9 Is the cut-off mark made public?  Yes  No
- 10 Who ratifies the final list?  
 Tech-U  State Government  Local Govt.  Other
- 11 How is the final list of the scholarship made known?  
 Internet/School Website  Local Govt. Secretariat  Politician  
 Others (specify) -----
- 12 So far which area do you notice a non-inclusion/inequality gap?  
 Gender  Religion  Physically Challenged  Indigents  
 Others (specify) -----
- 13 Rate the freedom of religion in the scholarship scheme  
 Very Low  Low  High  Very High
- 14 Do you notice any non-indigenes of Oyo State applied for the scholarship?  Yes  No
- 15 Has any non-indigene of Oyo State benefited in the scheme?  
 Yes  No
- 16 In your own view, are the scholarship awardees really indigent?  
 Most  Average  Few
- 17 What is the level of political influence on the selection process?  
 Low  High
- 18 In your assessment, which secondary school students have benefited most?  Rural  Sub-Urban  Urban/City  Outside Oyo State

## Notes

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- 1 Olumide Adebimpe Aderounmu, Head Operations, Development Practice Academy (DEPRA), Abuja, Nigeria.
  - 2 Imposed by the 'Oro' priest through the palace of the traditional ruler of the community.
  - 3 Translation: *Emi mo ohun ti mo nso ni Ibadan South-East yio. Esin Musulumi ti Alaga wa nse ni o poju ninu awon omo ti won nmu. E wa ni ejo ko lowo ninu. A o le yo esin kuro.*
  - 4 Translation: *Bi ijoba ko ba yi ona ti won ngba yan awon akopa ninu eto yi i, ki won o wa ona ti ko fi ni ni owo esin ninu ladugbo wa yio, ko le tojo.*

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## Chapter 4

# The Other Invisible Hand: How Freedom of Religion or Belief Fosters Pro-Social and Pro-Developmental Outcomes for the Poor\*

Rebecca Supriya Shah<sup>1</sup> and Timothy Samuel Shah<sup>2</sup>

### 1 Introduction

At 3.30 in the afternoon the stench from the abattoir across the road from Gita's<sup>3</sup> tiny vegetable shop hangs heavy in the warm and humid mid-monsoon air. Even as passers-by quicken their pace and reach for their handkerchiefs or *sari pallus* to cover their noses, Gita smiles as she acknowledges our discomfort. 'It stinks most of the time', she says 'but I never have to worry about customers. People come to buy meat from the *dhoddi* (abattoir) and stop here to get their vegetables. It's a good spot to have a shop.' Gita settles herself on a plywood crate and begins to talk about her husband:

*You ask me about my husband. Yes, he lives with me. By that I mean he sleeps in the house. I don't know much about where he is or what he does. Fifteen years ago, almost as soon as we got married, he started drinking and seeing other women. I poured kerosene oil on my body and set it alight. I did not want to live. I wanted to die.*

She then pulled aside her *dupatta* to reveal a body overwhelmed with burns and puckered scars. Her hands are so badly burned that her fingers are bent out of shape:

*I am alive because of God. He saved me. My neighbour broke down the door and rescued me. My church paid for my treatment and I was saved. I have three children today and my daughter wants to be a teacher. My husband continues to do bad things but God's grace gives me the strength to live. Whenever things get me down, I remember that I have to rely on God's strength and not my own.*

The implications of Gita's story – that what animates a person at the deepest level and gives meaning to life is motivation, spirit and strength of will – has profound implications for the ways in which the intersection of development and freedom of religion or belief (FoRB) should be understood, and it is the goal of this chapter to unpack these implications. The fact that

well-established development institutions and agencies such as the World Bank, the Norwegian Agency for Development Cooperation (Norad), and the Foreign, Commonwealth & Development Office (FCDO) now actively include FoRB in their programming tells us something important about the notable shift in the landscape of development organisations, which a few decades ago either shunned religious issues or confronted religious practices as obstacles to economic progress and social uplift. This global reconfiguration of the relationship between development agencies, religious organisations and communities in the latter part of the twentieth century has laid the groundwork for successive humanitarian and development interventions over the next few decades (Barnett 2011).

In 2014, the Sustainable Development Goals (SDGs) were announced to 'complete the unfinished work' of the Millennium Development Goals formulated by the United Nations in 2000 (Moon 2014). The SDGs included explicit plans for wide-ranging 'global partnerships' (*ibid.*) with religious leaders and institutions across the globe. More recently, there have been efforts by a range of development and donor agencies, particularly in Europe and the United Kingdom, to explore the impact of FoRB on various dimensions of development, such as gender equality. However, the ultimate test of whether FoRB can contribute to the simplified goal, 'leave no one behind' is if both donors and development practitioners cease perceiving it as a narrow human right understandable in primary legal categories and, consequently, an issue with little direct connection to the wider social and economic issues of poverty and development.

Moving ahead to include FoRB in development and humanitarian interventions at international, national and local levels will require key stakeholders to protect all dimensions of FoRB. These dimensions include interior dimensions of belief, thought and conscience, as well as exterior dimensions of religious practice, behaviour and belonging. This study examines how FoRB in all these robust dimensions – individual and private as well as communal and public – are systematically related to key dimensions of development and particular SDGs for one significant cross-section of individuals: religiously marginalised, poor Dalit women in Bangalore, India.

Specifically, this chapter focuses on ways in which the protection of FoRB for these doubly marginalised Dalit women might: (a) empower and equip them to build resilience and reduce exposure and vulnerability to economic shocks (SDG 1.5); (b) enable them to negotiate better wages and working conditions (SDG 5.4.5a); and (c) ensure they live in peaceful and inclusive societies where individuals can freely exercise and express their religion or belief in private and in public, and if they choose, change their religion without the threat of coercion, violence or death (SDG 16).

The structure of the chapter is as follows. The first three sections introduce our basic approach and methodology. Section 1 provides a brief overview of the context in which the study was conducted, as well as a short description of the ongoing impact of the Covid-19 pandemic on the individuals and households in this sample. Section 2 sets out the methodology adopted for the study and provides an overview of the data used to explore the relationship between FoRB and a few key dimensions of development. Section 3 introduces a tripartite framework for understanding the capacity

of the poor to sustain shocks and challenges in order to overcome poverty, i.e. in terms of adaptive, anticipatory, and absorptive capabilities. It also briefly describes the scope of our case study; defines our key terms, including FoRB; summarises how we measure religiosity; and identifies the indicators we use to assess the wellbeing of respondents in light of the SDGs.

The next three sections contain our analysis and substantive findings. Section 4 analyses our data to show how the protection and promotion of FoRB among the most vulnerable individuals – poor Dalit women – can improve the day-to-day lives of these individuals and, in particular, enhance the overall economic and social health of their families. Section 5 analyses and summarises our data on the relationship between religious participation and religious tolerance, and concludes that for all communities higher religious participation is associated with higher levels of religious tolerance. This supports the conclusion that FoRB can set in motion a virtuous cycle in which FoRB makes it possible for people to participate in religious communities and institutions in the first place, and that this participation, in turn, generally tends to strengthen religious tolerance and support for the freedom of religion or belief of others. Greater FoRB begets greater participation, in other words, and greater participation begets greater FoRB, and so on. Section 6 concludes by summarising FoRB's potentially transformative and pivotal role in development. In our study of a South Asian context in which FoRB is gravely under threat and global development indicators have seen very slow improvement, it is evident that FoRB can help activate and unleash a variety of religious, moral, and social resources that can significantly enhance the capacity of poor Dalits to manage and even overcome a variety of intersecting inequalities.

Furthermore, these cases and data present a story that is not simply one of adopting FoRB in the service of development and humanitarian initiatives. Rather, in each of the case studies and in the data presented, we see the crucial pro-developmental significance of adopting a more realistic and expansive understanding of FoRB that includes, among other things: freedom to choose one's religion; freedom to exit from one's religion; freedom to worship without hindrance and restraint; and freedom to enjoy non-discrimination and equal treatment relative to religion or belief. While economic and social uplift is a laudable objective for development agendas such as the SDGs, the ultimate goal – and the one that promotes what people value – is an expansive and multidimensional freedom that is at its core a freedom of mind, will and spirit. Thus, FoRB ought not to be considered a mere means to development objectives narrowly conceived, but as a crucial development objective in itself.

### 1.1 Technology parks and tarpaulins: slums in India's Silicon Valley

Following the financial deregulation policies of the Indian National Congress government in 1991, Bangalore established a large number of special economic zones for IT and electronics companies to attract federal funding and government subsidies. In the early 1990s, Bangalore opened its first 'Electronic City' on 330 acres of prime land on the highway linking the state of Karnataka with the neighbouring state of Tamil Nadu. Electronic City became a hub for over 200 of India's top IT companies, including many

large international firms such as Bosch and General Electric. Bangalore developed a reputation as the ‘Silicon Valley of South Asia’, drawing thousands of highly trained engineers to the city. The growing IT industry led to a dramatic increase in house prices. Lower- and middle-income wage earners were asked to leave their homes so large-scale apartment complexes could be erected to house the growing numbers of workers arriving in the city from across India.

Spurred on by a booming global IT-driven economy, Bangalore has seen a dramatic rise in land prices and an acute lack of affordable housing. Since 2001, the population living in tenement housing in Bangalore has tripled, with at least 200–300 large slums dotted across the city. This rapid increase in the slum population in Bangalore is also a result of increased rural–urban migration from northern Karnataka. A study conducted by Duke University in 2018 found that Bangalore had over 2,000 slums, while the government only recognised 597 (Raj 2018). Most of the slums exist on prime real estate in the centre of the city and risk being demolished if the government decides to sell the land to developers.

Our examination of the three large slums in our sample area reveals that the majority of dwellings are a mix of informal shelters where families live under blue plastic tarpaulin roofs and one-room hutments with mud floors and asbestos roofs. Most families in Bangalore’s slums spend their entire lives living under tarpaulin roofs, mainly because of the very high cost of housing in areas in the city where people can find well-paid jobs and where the slums are now established. The Duke University study found that 40 per cent, or four out of every ten people living in Bangalore’s slums, had lived there for more than one generation.

This study interviewed individuals from two of the main slums in north Bangalore, New Lingarajapuram and Sait Palya, both of which have more than 10,000 residents who have lived in the slums for over three decades. Like most slums in Bangalore, the boundaries of New Lingarajapuram and Sait Palya keep changing and expanding. Most of the homes in these slums are semi-permanent dwellings with flimsy asbestos or tin sheet roofs, with a few two-storey concrete structures built by people able to get their housing and identity documents finalised, and who found the funds to be able to construct a home. New Lingarajapuram is home to a large group of migrant workers from northern Karnataka who arrived in the mid-1990s during a period of drought and stayed on to find work in the city. Sait Palya is one of the largest Dalit Muslim slums in north Bangalore. Dalit Muslims who live in Sait Palya are either employed in the local markets or work in the nearby abattoir and tannery.

## 1.2 The Covid-19 pandemic: a natural experiment

By 2030, build resilience of the poor and those in vulnerable situations, and reduce their exposure and vulnerability to climate-related extreme events and other economic, social and environmental shocks and disasters.

(SDG Target 1.5, UNDP 2020)

Building resilience is explicitly mentioned in a variety of proposed SDG targets. In particular, target 1.5, quoted above, is clear about the pivotal role resilience will play in addressing persistent and entrenched poverty. In addition, target 13.1 states that it aims to ‘strengthen resilience and adaptive capacity to climate-related hazards and natural disasters in all countries’ (UN Stats 2020).

The current Covid-19 pandemic is perhaps the greatest test of countries’ resilience. It has challenged almost all areas of sustainable development, including health, economic empowerment, finance, inequality, gender-related violence and climate control. A recent report by the special rapporteur on extreme poverty and human rights warns that the Covid-19 pandemic is ‘projected to push more than 70 million additional people into extreme poverty, and hundreds of millions more into unemployment and poverty’ (Alston 2020). The report continues, stating that ‘poor people and marginalised communities have been the hardest hit in almost every country, both in terms of vulnerability to the virus and its economic consequences’ (*ibid.*).

The disastrous fallout from the pandemic has exposed a crucial message for development policymakers and practitioners: sustainable development is multidimensional, and any effort to reduce vulnerability and build resilience among the poor must move beyond the narrow focus of economic and social deprivations. It must come to appreciate that FoRB is a valuable resource that could limit and even reverse the consequences of persistent poverty for millions of vulnerable people living on the margins of society.

This study began in March 2020 to collect data on the intersection between FoRB and key dimensions of development, including economic empowerment and gender equality. But within a few weeks of conducting our case study interviews, the Covid-19 pandemic prompted Indian Prime Minister Narendra Modi to impose a countrywide lockdown for almost three months, from the end of March until the middle of June. The pandemic has precipitated one of the worst economic downturns in generations, in India and across the globe. In rural and urban India, the nationwide lockdown has affected vulnerable and marginal populations, particularly unsalaried daily wage labourers and migrant labourers in major cities who lost their jobs due to protracted curfews and the continued closure of many businesses, including construction projects.

Thus, the exogenous economic shock of the Covid-19 pandemic, which occurred in the middle of our data collection process, served as a natural experiment. From this, we hope to draw conclusions on the role of various dimensions of FoRB in affecting the capacities of the individuals in our sample to absorb and adapt to the shocks, stresses, risks and uncertainties caused by the pandemic. We identified whether individuals were able to enjoy freedom of non-discrimination and equal treatment regardless of their religious tradition; and what difference this made in terms of their resilience in the face of the massive, unanticipated shock of Covid-19, subsequent lockdowns, and all their associated economic, social and spiritual repercussions.

In addition, at a time of profound uncertainty and deep economic and social loss, the Covid-19 pandemic provides an unprecedented opportunity to examine whether the protection of FoRB among the poorest and

most marginalised communities in the slums of Bangalore contributes to building resilience and reducing the vulnerability and exposure of individuals and families. In addition to the role of individual dimensions of FoRB on economic and social uplift, the pandemic enabled us to assess ways in which religious institutions, particularly Christian and Muslim organisations, provided a much-needed safety net for the poor. The government's public distribution system either excluded certain minority groups or was inadequate to meet the essential needs of the poor in the slums in our sample.

Our assessment, albeit basic and limited at this stage, might provide a quantifiable and observable metric of the ways in which religious communities and institutions take immediate and tangible economic burdens off the state and local communities. Our tentative conclusion is that it is difficult to exaggerate what the Indian economy might lose if religious communities and institutions are limited or prohibited from providing valuable and often indispensable services for Indians, particularly for the poor and those living on the margins of society.

## **2 Methodology and data**

### **2.1 Definitions**

According to Article 18 of the Universal Declaration of Human Rights and Article 18 of the International Covenant on Civil and Political Rights, FoRB is designed to cover all aspects of religious (and belief-oriented) life, including the believing, belonging, and behaving of individual and community persuasions and practices. Heiner Bielefeldt, the UN special rapporteur for FoRB from 2010 until 2016, declared that the right to FoRB 'empowers human beings in the entire sphere of religious and non-religious convictions, conscience-based positions and religious practices which may be exercised by individuals alone and/or in community with others' (Bielefeldt 2016). Furthermore, like all human rights, the right to FoRB is intimately connected to core dimensions of the human person and the needs of human personality, and thus should apply to all human beings equally.

In this chapter, we explore the importance of FoRB for development based on the premise that FoRB is more than the freedom to hold interior religious convictions or of individuals to worship (or not) in private. Rather, as international documents and norms suggest, we include dimensions of FoRB that go beyond the private believing (or non-believing) of individuals: (1) the freedom to participate privately or publicly without hindrance in a religious community of one's choice; (2) the freedom to adopt, change or exit a religion of one's choice; and (3) the freedom to enjoy non-discrimination and equal treatment relative to religion or belief.

### **2.2 The sample**

The data for this study is drawn from two main sources. The first set of data comes from 30 case studies of Dalit women entrepreneurs from Hindu, Muslim, Catholic and Protestant religious traditions who live in two adjacent urban-poor areas (shanty towns) in north Bangalore. The second section of the data is drawn from a longitudinal study of 9,575 randomly selected individuals from the same geographic area, who are part of the Religion and Economic Empowerment Project (REEP)<sup>4</sup> panel study funded

by the Templeton Religion Trust (Templeton Religion Trust 2020). This panel study conducted two waves of data collection to clarify and quantify the pro-social and pro-developmental effects of religion and religious freedom on the lives of Dalits in five sample areas.<sup>5</sup> In this chapter, we use the second wave of data collected in 2018. Unfortunately, due to religiously motivated violence in four villages in one of our sample areas, we had to drop data collection in these locations. This reduced our panel sample by 1,000 respondents. We also excluded surveys following a thorough cleaning and coding of the data set. In this chapter, we use the REEP data set with 7,637 respondents (79.7 per cent).

The REEP data set includes over 1,200 respondents from the two slums in north Bangalore. Additionally, the 30 women interviewed in early 2020 were part of a longer panel study on microcredit entrepreneurs that Rebecca Supriya Shah began in 2011 (Shah 2013b)<sup>6</sup> The female Dalit microcredit entrepreneurs were folded into the larger REEP panel study and 30 of these women were interviewed for the current research.

### 2.3 Why employ a case study approach to study religion and religious freedom in Bangalore, India?

We chose to employ a case study method in this chapter because case studies are often robust precisely where formal statistical methods and models are weak. In most contexts, but especially in pluralistic contexts such as South Asia, it is a challenge to speak of religion or religious traditions such as Hinduism, Christianity, or Islam as single, monolithic realities. In South Asia, the difficulty of clarifying and quantifying the potential impact of religiosity on social uplift is compounded by the ways in which the main faith traditions have interacted with and been influenced by Western concepts of religion. After all, many today think of Hinduism as a single, easily identifiable ‘world religion’<sup>7</sup> that we read about in school textbooks and see represented in the media.

However, it was not until the propagation of a reconstructed ‘neo-Hinduism’ in the nineteenth century that the term ‘Hinduism’ came to signify a unified and inclusive religious entity in India and the West. Yet the modern Hinduism we see today, and the one that took shape over the nineteenth and early twentieth centuries, does not necessarily correspond neatly with the vast diversity and dynamism of religious traditions in India. This is especially true given that the subcontinent has witnessed elaborate forms of devotion to thousands of deities, and has seen followers of Buddhism, Jainism, Islam, Zoroastrianism, Judaism and Christianity trace their spiritual ‘ancestry’ back thousands of years.<sup>8</sup>

Another challenge in studying the causal effect of religion and FoRB on economic and social uplift is that in South Asia in general, and in India in particular, an individual’s religious identity, religious beliefs and religious behaviour (or practices) may be tightly interrelated – and constitute a coherent package – but in other cases they may diverge in highly idiosyncratic and unpredictable ways. An individual might self-identify as a Hindu but also believe in the healing power of Christian saints and regularly pray at a Muslim holy shrine. It is also common to find individuals who identify as having more than one religion.

When a woman is interviewed in her home, she is asked, 'Who is the main god you worship?' In most cases, the women will respond that they worship 'all gods'. To which one may need to ask, 'Who is the main god?' or 'Who is the house god?' These questions, while important to gather statistics on religious affiliation, may sometimes limit or inaccurately categorise adherents as worshipping one god over another. This is particularly problematic when using words such as 'believe', 'affiliation', 'belonging', 'identity' or 'identification', which are categories and instruments based on a monotheistic idea of the transcendent and might not apply to faith traditions such as Hinduism, Jainism or Buddhism.

For example, some of the women I interviewed 'believed' in the power of Saint Anthony to heal their sick children but 'belonged' to the Hindu faith. Unpacking affiliation in a pluralistic context such as India is challenging because traditional measures of private prayer, religious service attendance, belief in God, and whether or not one gives money to a religious organisation might not capture the 'shared religiosity' of individuals, especially in the case of the poor who seek help from whatever 'transcendent being' is able to deliver assistance. In India and in our sample area of Bangalore, significant numbers of women have multiple religious identities, beliefs and practices. It is difficult to situate a woman in one camp when she resides at the intersection of many different camps.

Despite the many advantages of a case study approach to analysing the potential impact of FoRB on dimensions of development, we realise that all methods have assumptions and weaknesses. We admit that using only case study data might not provide the kind of statistical data to demonstrate the level of impact FoRB might have on various dimensions of development. Therefore, we have included some selected statistics from the REEP study to demonstrate that, for the most part, the case studies in our study are consistent with the preliminary findings from the larger, randomly selected household survey also conducted in the same geographic area.

Furthermore, we do not believe or propose that religion or FoRB are a necessary or sufficient condition for sustainable development among the poor, whether in Bangalore, in South Asia or in any other context. We are not proposing a deterministic relationship between FoRB and sustainable development, just a probabilistic one. There are many factors that influence sustainable development for the poor in general and for vulnerable populations in particular. Our goal here is to try to identify plausible causal pathways by which the protection and promotion of FoRB might significantly influence key dimensions of development.

### **3 Harnessing adaptive, anticipatory and absorptive capability for poverty alleviation**

This section of the chapter is organised along three main dimensions of sustainable development that could explain if and how FoRB might foster economic and social wellbeing for poor and vulnerable Dalit individuals. These dimensions have been borrowed from the growing literature on strengthening resilience capacity in the face of climate-related extreme events and other hazards and shocks (Shepherd *et al.* 2013; Bahadur *et al.* 2015).

In particular, we have adopted the conceptual framework of resilience literature – which includes adaptive capacity, anticipatory capacity and

absorptive capacity – to frame our exploration of the potential causal impact of FoRB on building resilience and reducing vulnerability among the urban poor in Bangalore. However, instead of using the term ‘capacity’, we have chosen to use the term ‘capability’ instead. Thus, the three dimensions we will examine in the rest of the chapter are the three crucial capabilities of individuals – adaptive capability, anticipatory capability and absorptive capability – to absorb shocks and to deal with poverty and deprivation.

We have chosen to use the term ‘capability’ – which is rooted in the concept of ‘human capabilities’ that was introduced by Nobel-prize winning economist Amartya Sen – to focus on both the ability (capacity) and the freedom of individuals to choose what they value and have reason to value. Capacity is interconnected with capability, since a person’s ability to deal with adverse events influences their capability to enjoy and pursue what they value and have reason to value, such as providing food and shelter for themselves and their family. Furthermore, the term ‘capability’ goes beyond the fulfilment of basic needs and provision of income, taking into account the intrinsic significance and value of human choice and freedom.

Adaptive capability, for the purposes of our analysis, might be defined as the ability of an individual to adjust to changing circumstances, take risks, take advantage of changing opportunities and maintain one’s desired state or standard of living, even if the surrounding conditions have changed or are about to change. Again, drawing heavily on environmental studies, we define anticipatory capability as the ability of individuals to predict, and prepare and plan for particular shocks that might adversely affect their ability to run their business or feed their families. Anticipatory capability demands that individuals are flexible enough to engage with sudden shocks and reduce the impact of these risks on their lives and livelihoods.

Finally, we examine the role of an individual’s absorptive capability to bear and even endure persistent disasters and deprivations. An individual’s ability to absorb the impact of an exogenous shock, such as the sudden illness of a family member, might be because religious networks, communities or groups of which they are a part help them manage the risk by providing access to low-cost services, advocating to the government on their behalf, or providing financial and other resources to smooth their consumption.<sup>9</sup> A person’s capability is directly tied to their freedom, which is in turn inextricably linked to the inherent dignity of all members of the human family.

### 3.1 The case study and survey respondents

All the surveys, including the case study interviews, targeted Dalit women aged 18 years or older. We employed purposeful sampling for the 30 case studies in our sample. We actively selected the cases to explain the role, if any, of FoRB on economic and social uplift. We chose women who were deeply involved in their faith community as well as financially stable, by which we mean the women had jobs. In most cases (28 out of 30), they were the main breadwinners of the family and were able to support their families before and after the exogenous shock of the Covid-19 pandemic. By selecting the 30 cases in our sample based on the dependent variable (economic empowerment and social uplift), we risk being accused of selection bias. However, we take the position outlined in Stuart and

George (2005) that ‘cases selected on the dependent variable can help identify which variables are not necessary or sufficient conditions for the selected outcome’ (*ibid.*: 23).

In addition, we selected the cases based on the dependent variable to help us identify potential paths and other variables that might help explain how the outcome was achieved. Given the paucity of micro-level research on the potential contribution of FoRB to sustainable development outcomes for the poor, we chose to select the case studies based on the dependent variable to help identify what variables contribute to the outcome, as well as the magnitude of their contribution to the outcome. Our approach seeks to empirically explore the role of FoRB on sustainable development to see whether our evidence warrants a more rigorous and ambitious assessment of the causal relationship.

In other words, we aim for a ‘plausibility probe’ in an effort to make an empirically informed judgement on whether we need to conduct a deeper and more intensive investigation of certain variables that might be associated with a person’s ability to adapt to, anticipate and absorb the effects of poverty and deprivation over time.

### 3.2 Our understanding of FoRB

We define FoRB as meaning the following:

- 1 The freedom to participate privately or publicly without hindrance in a religious community of one’s choice;
- 2 The freedom to adopt, change or exit a religion of one’s choice; and
- 3 The freedom to enjoy non-discrimination and equal treatment relative to religion or belief.

### 3.3 Measuring religiosity

We measured religiosity by asking respondents in our case studies and in the larger REEP survey about the **frequency of religious service attendance** with the question, ‘How often do you attend religious services?’ Individuals could choose to answer: never; occasionally; once a week; a few times a week; once a day; several times a day; or refuse to answer. The scores were recoded to a continuous variable ranging from 0 (less than once a week) to 1 (once or more a week).

To measure the salience (Stark and Glock 1968) of religion or **the specific attachment of religion to an individual in their daily lives**, we asked, ‘How important is your religion in your life?’ Individuals could choose to answer: the most important thing in my life; very important; important; somewhat important; not important; don’t know; or refuse to answer. Here again, the scores were recoded to a continuous variable ranging from 0 (somewhat and not important) to 1 (most important, very important and important).

Another measure of affective religious beliefs that we use is whether an individual ever prays alone. However, as we mentioned earlier, some measures of religiosity may not easily be applied to Indic religious traditions such as Hinduism, Buddhism and Sikhism. For example, Hindus and Buddhists might not leave their home to visit a religious place of worship as frequently as devout Catholics or Protestants. Therefore, to

identify measures of religiosity that could be more religion specific, we asked individuals who self-identified as Hindu, Buddhist or Sikh if they maintained a strict vegetarian diet. Hindus were also asked if they ever conducted *puja* (devotions and prayers to the deity) at home.

### 3.4 Dimensions of sustainable development

#### 3.4.1 Asset accumulation and business ownership<sup>10</sup>

To assess the association of FoRB with particular religious beliefs, practices, and networks, and their impact – if any – on asset accumulation, we include productive goods, financial wealth, and networks that might enable individuals to negotiate and access positive economic outcomes and positions in the market. In particular, we examine data on bank accounts and washing machines to illustrate the importance of having and harnessing productive assets to enable the poor to reduce exposure to risks and reduce their vulnerability to falling into persistent poverty.

In our sample area in Bangalore, we also asked individuals if they had a bank account. Individuals who did have a bank account were also asked if the account was their own account, a joint account with their spouse (if they were married), or if they and their spouse both had separate bank accounts. Women who were part of the case study interview research were asked if they were members of a credit or savings group (known as a *sangam*) of any organisation. If a woman is part of a credit or savings group she is more likely to save and have access to small loans from the revolving credit in the group.

#### 3.4.2 Interest rate

The informal credit markets in the slums of Bangalore and elsewhere in India are often the only recourse to finance where formal credit institutions do not exist. In places where formal financial institutions do exist, they may be less willing to lend to borrowers with little or no collateral. Informal moneylenders who operate in close proximity to their borrowers reduce or raise interest rates based on what they know about the behaviour, job status and reliability of a potential borrower or any other factors that could influence the level of risk of lending to that individual. In other words, the ‘price’ of the loan is not fixed but depends on many factors, including the ‘reputational capital’ of the would-be borrower.

#### 3.4.3 Living with diversity

To examine the impact, if any, of the religious commitment and practice of individuals from a variety of religious traditions on tolerance and religious pluralism, we asked respondents to respond to the two following statements: (a) ‘I would not object to a person of a different religion moving next door’; and (b) ‘Everyone should have the freedom to convert to whatever religion they want to.’ Individuals in our sample were asked to answer by using the following responses: strongly agree; agree; disagree; strongly disagree; don’t know; or ‘refuse to answer’.

## 4 Data collected at individual and household levels

### 4.1 Religiosity and FoRB in Bangalore, India

Data on FoRB among different religious groups and for all Dalit individuals in our sample area reveals a deep and active commitment of

the most disadvantaged groups to their religious traditions (Table 4.1); 74 per cent of our purposively selected sample of women entrepreneurs in the area reported that they prayed at least once a day. What begins to emerge from our case study data and our survey data is a picture of some degree of protection of FoRB in Bangalore city. However, recent reports (Religious Liberty Commission of the Evangelical Fellowship of India 2020) suggest that the state of Karnataka, of which Bangalore is the capital city, has experienced a spate of religiously motivated attacks on minority communities in rural and northern parts of the state. This intersection of religious minority status and FoRB identifies, to some extent, if and how FoRB can influence social and economic wellbeing.

We see that our data from Bangalore displays a significant degree of churn in the type of religious changes that take place in our sample. While over 5 per cent of our sample switched to a Christian religious tradition, 14 per cent of individuals switched out of non-Hindu religious traditions to become Hindus. Religious changes occur as a result of a voluntary decision to switch, because of marriage, or due to pressure from external agents including the government. Unlike other states in India (which total at least nine, including Gujarat and Jharkhand), Karnataka does not have a state-level freedom of religion law to regulate the conditions under which an individual may change her religion. Freedom of religion laws penalise attempts to convert people from one religion to another using force, fraud or inducement, and require any individuals who wish to formally change their religion to seek the prior permission of local district officials. In order to secure this permission, the burden of proof is on the individual seeking to convert to demonstrate that they are converting of their own free will.

Although there is no formal freedom of religion law in the state of Karnataka, Christian and Muslim Dalits are still subject to restrictions on affirmative action benefits, including official exclusion from government jobs and seats in legislatures and higher education institutions. This restriction is administered under Presidential Order of Article 3 of the Constitution on Scheduled Castes. Under this order, Christians and Muslims are excluded from these benefits because they are not Hindu and officially reject the caste system (though caste prejudice still affects both communities). Under Article 25 of the Constitution, Sikhism, Jainism and Buddhism are considered sects of Hinduism, even though members of these religious communities consider the religions distinct from Hinduism and with the government's blessing maintain their own, separate personal law codes.

#### 4.2 Deeply held beliefs

*My daughter wants to be a policewoman. Look at me! I clean houses and my daughter wants to be a policewoman. I worked for four years to get this land to build a home so we can have the security we need. It will cost me 4 lakhs to build. The government will give me 2 lakhs but I will need to find the rest of the money. I know it is a lot of money. I will borrow from four or five people. I know I will get a good rate. I've been looking around to find a good interest rate. I asked the goddess to help me. I did puja for four days. She gave me this land and she will give me the money to*

**Table 4.1 Select indicators of religiosity and FoRB among case study participants (n = 30)**

Indicator	Percentage (%)
Prays alone at least once a day	74.05
Religion is important, very important, or most important	99.90
Attends religious services once or more a week	68.40
Muslims who fasted during Ramadan	99.38
Hindus who performed <i>puja</i> at home	88.32
Hindus who pray to the goddess Yellamma	29.76
Individuals who enjoyed the freedom to switch religion from a non-Christian religion to a Christian religion*	5.40
Individuals who enjoyed the freedom to switch religion from a non-Hindu religion to Hindu	14
Individuals who enjoyed the freedom to switch religion from a non-Muslim religion to Muslim	0

Note: \* This data is for individuals who switched from any non-Christian religion to become a Protestant, Catholic or Orthodox Christian.

Source: Authors' own.

*build on it. I don't want my daughter to marry until I have a house for her to live in.*

(Sujatha, worshipper of goddess Yellamma)

We assume, because of the lack of availability of access to credit for the poor, that there is a dearth of moneylenders in poor neighbourhoods. We also assume that most, if not all, moneylenders charge high interest rates and operate as a monopoly. This is not the case. In reality, there are many different moneylenders who are available to provide credit. The slums in our case study sample have over 30 informal moneylenders in a 0.25 square mile block.

In most cases, the moneylender fixes the rate of interest to cover both the cost of lending to a risky individual and the cost of monitoring them. In doing so, the moneylender fixes a price for each individual based on their risk of paying back the loan. Once the 'price' of lending to an individual is fixed it might be difficult for them to switch lenders. The poor borrower then becomes accustomed to a few lenders who have done their 'due diligence' on the risk of lending to that individual.

Also, once the lender identifies a 'price' for the loan it will be difficult for the borrower to switch to another lender and restart the process of being 'evaluated.' Furthermore, if the borrower decides that they wish to switch to another moneylender this might arouse suspicion with other lenders. They might not wish to lend to someone who was 'having issues' with a moneylender and adverse selection comes into effect. Therefore, since the poor are often 'locked' into a relationship with a moneylender, they might

have to pay the interest rate set by the lender and not be able to negotiate a lower rate.

Individuals who are aware of the various prevailing interest rates might be able to identify a moneylender who could offer them a lower interest rate than the one offered by their 'regular' lender. This knowledge might prompt them to escape the monopoly pricing charged by their moneylender and switch to another lender who might charge a lower interest rate. Unfortunately, in most cases, the poor borrow under conditions over which they have little control, such as the sudden death of a family member or a natural disaster that decimates their savings and assets.

Also, if an individual knows the interest rate, they might be better able to plan their expenditure. An individual who is either unaware of what interest rates they are paying, or who does not understand what an interest rate really is, risks being charged a higher interest rate by unscrupulous moneylenders than those who are able to understand the system. It is not uncommon for a poor individual to pay moneylenders 5–8 per cent interest daily.

Individuals who take time to learn about interest rates, who actively seek a competitive interest rate based on their study of the market, and who are able to switch to moneylenders with lower interest rates exhibit the adaptive capability to make deliberate and planned decisions in the face of fluctuating conditions. An individual's adaptive capability is formed and strengthened during periods when there are no emergencies. During these times, individuals can diversify their risk profiles, build resilience and reduce vulnerability to extreme events by identifying moneylenders who are able and willing to provide loans at competitive rates.

We find that deeply held religious beliefs and practices are generally associated with positive social and economic outcomes. We find that religious commitment – including religious belief, behaviour and belonging – that is deeply held and personally appropriated is generally associated with positive and social economic outcomes. Such intense commitment to one's religion is in contrast to one that is less personal and creedal and more ritual, practice and community oriented. To be clear, we are not saying that personal religiosity and formal religiosity are contrasting or contradictory, or privilege a Western, Protestant and individualistic form of religious commitment and practice.<sup>11</sup> Instead, we wish to distinguish deeply and personally held forms and levels of religious commitment from those that are relatively formal, routinised and external.

Our data finds stronger statistical support for the story of Sujatha who plans to hunt around her slum neighbourhood to find the best interest for the loans she must take to build her house. Respondents such as Sujatha who have particular and deeply held religious commitments are more likely to know the interest rate they pay. This is not so for all religion-specific commitments, but we find that under certain conditions, and for some measures of religion-specific measures of religiosity, there is a strong causal association between religiosity and knowing the interest in one's immediate neighbourhood.

We are not saying that all types of deeply held religious beliefs are associated with a better knowledge of the prevailing interest rate. Rather, we are suggesting that based on our data, certain types of affective religious commitment and practices are associated with a reasonably good knowledge

of interest rates that are available if and when an individual needs to borrow money. Additionally, we find that in general, and under certain conditions, respondents for whom religion is important are more likely to know the interest rate they pay.

Our survey data finds that praying to the goddess Yellamma is consistently associated with respondents knowing their interest rates. The association remained strong after we controlled for caste, age, marital status, years of school and survey location. Three out of the seven Hindu women in our sample who openly admitted to being worshippers of the goddess Yellamma (including Sujatha) were also successful businesswomen who, when interviewed, knew the exact interest rate they were paying on their loans.

But worshippers of the goddess Yellamma are not alone in being experts on the prevailing interest rates in our sample. Muslims who are more affectively attached to their religion, as indicated by their commitment to fast for Eid al-Fitr every year and who are strict about how they fast (they do not consume water or even spit during their fast), are also more likely to know the interest rate they pay. All the respondents in our sample from all religious traditions were drawn from most Dalit scheduled caste backgrounds.

In India, there is an increasing suspicion of Muslims who appear devout in their beliefs and practices. However, we see that when certain religious beliefs and practices are more salient, there is a strong association with positive economic and social outcomes. This might be a good argument for ensuring that marginalised individuals and groups enjoy adequate space to foster and develop their own deep and personal religious commitments. In addition to the intrinsic value of their religious commitment, we see the quantifiable positive outcomes of their capability to anticipate and adapt to adverse economic events and outcomes.

Unfortunately, worship of the goddess Yellamma is under threat in parts of Karnataka and Andhra Pradesh. Devotion to the goddess,<sup>12</sup> whose rituals include regular animal sacrifices and, in some cases, worship in the nude, does not sit well with Hindu religious leaders, including those who have been influenced by *Hindutva* teachings. These leaders have now engaged in efforts to revise the structure, beliefs and practices of this ancient multifaceted faith, and infuse them with a political and nationalistic emphasis. In short, these reformers wish to create a 'sanitised' version of Hinduism that scrubs out of existence and recognition the worship of deities such as Yellamma, which is regarded as superstitious and ignorant.

In a context where credit is expensive and moneylenders control the market, Sujatha and women like her demonstrate efficacious agency and a willingness to invest the time and effort to understand the market. Could it be that when people like Sujatha are free to be entrepreneurial in religious matters they are empowered to be entrepreneurial in other areas?

### **5 FoRB, pluralism, and inclusive societies**

We find that respondents with higher self-reported levels of religious commitment and practice (based on several distinct metrics) were more likely to be tolerant of people from other religious communities than respondents with lower levels of religiosity. For example, we find that individuals, regardless of religious tradition, who attended religious

services weekly or more were more tolerant of having a neighbour of a different religion. And again, as we have seen across the data, in general and under certain conditions, individuals for whom religiosity is deeply held and who self-report that their religion is important in their lives are also more likely to say that it is acceptable to live with neighbours from different religious traditions.

Additionally, we find that respondents who rate highly on religious service attendance and religious commitment are more open to the idea that people should have the freedom to convert if they wish. This same basic causal finding – that higher religiosity correlates with higher religious tolerance – holds for almost every religious community sampled, including Hindus, Muslims, Sikhs, Protestants, and Catholics.

An earlier study by Yogendra Yadav, Alfred Stepan and Juan Linz, based on the National Election Study in India and the State of Democracy in South Asia Survey, supports the same broad conclusion. For the 2004 National Election Study, Yadav, Stepan and Linz constructed an index of religious intensity, from low to medium to high, to determine if growing religious intensity correlates with ‘growing undemocratic attitudes and practices’ (Stepan 2010: 41). It turns out that for Hindus, as well as other religious groups they studied (Muslims, Sikhs, and Christians), the ‘exact opposite’ is true. Specifically: ‘For **all** four major religions in India, for each increase in religious intensity, there is an increase in support for democracy’ (*ibid.*: 41; Calhoun, Juergensmeyer and VanAntwerpen 2011).

Every religion in India has some version of expressing respect and admiration for other religious traditions. The religious texts and practices of Indic religions preceded modern Indian civil law and addressed the importance of living in harmony with people who were different from oneself. Not all of this can be understood from polling or census data. The world’s great faiths, many of which originate on the Indian sub-continent, teach their adherents to be generous, temperate and optimistic, to remain calm in the face of trouble and to be tolerant of ‘the Other’.

Most interfaith engagements take place in a local context – in somebody’s home. Protecting and promoting religious structures and defences drawn from India’s rich Indic tradition have the potential to transform warring communities and instil core character virtues of tolerance, trust and respect that are deeply ingrained in Indic religions and culture. Then, and only then, will the millions of Indians from majority and minority religious communities be able to recover their history of pluralism, religious freedom and tolerance, and replant it in the soil of their own indigenous spiritual and cultural traditions.

## **6 Analysis: What does the intersection between FoRB and key dimensions of development tell us?**

Caste disparity in India, like its ugly counterpart racial disparity in the US, is a stubborn reality of our twenty-first century world, both having survived being outlawed for decades on both continents. This section of the chapter discusses our findings and is primarily undertaken with a view to understanding how concepts such as inequality, deprivation, persistent poverty and exclusion entail not just economic or social, but also spiritual and moral dimensions.

Multidimensional deprivations between and within groups defined and disaggregated in terms of social, economic, cultural, and political factors have become a central feature of national and international poverty alleviation policies and programmes. It has also become clear that the very definition of deprivation – multidimensional or otherwise – influences how indicators of poverty are framed as well as how data on poverty are collected and analysed. These indicators are often the only means by which governments, policymakers and people in general come to know ‘what matters’, and thus how to shape policies to end poverty.

Let us for a moment consider that concepts of caste are in fact the predominant marker of deprivation in India. We see from studies such as the ground-breaking Sachar Committee Report (Prime Minister’s High Level Committee Cabinet Secretariat 2006) that caste and religion play significant if not primary roles in the persistent and entrenched poverty of marginalised religious minorities in India. The report documents extensive inequities between majority Hindu Dalits and Muslim Dalits. The report also found that government programmes since Indian Independence have mainly benefited some Hindu Dalits and tribal communities but not religious minorities.

The Constitution of independent India set the stage for an appropriate set of policies and laws concerning caste discrimination, including outlawing ‘untouchability’ in 1955, regulating temple entry to allow historically restricted groups the freedom to enter, and even designing a set of recommendations for public employment and public education. However, although the Indian Constitution allows for positive forms of discrimination akin to affirmative action on behalf of India’s lowest-caste groups (‘Scheduled Castes’ (SCs))<sup>13</sup> and tribes (‘Scheduled Tribes’ (STs)), those who are favoured cannot be members of Muslim or Christian minority communities. A presidential order in 1950 stipulated that ‘no person who professes a religion different from Hinduism shall be deemed to be a member of a scheduled caste’. A later ruling further clarified that Sikhs and Buddhists were, for these purposes, to be considered ‘Hindu’. No such stipulations were placed on ST identity.

The argument in favour of the presidential order has been that officially, at least, Christians (and, to some extent, Muslims as well) do not recognise caste and, therefore, low-caste Christians or converts to Christianity (or Islam) cannot be considered low caste. Opponents of the order, including the author of the Sachar Committee Report, have maintained that Dalits or members of SCs suffer inherited discrimination for many reasons but most particularly because of an entrenched belief that a Dalit is permanently impure and suffers a kind of inherited defilement. A Christian or Muslim Dalit still suffers prejudice because of their low-caste state at the hand of both Hindus **and** their co-religionists.

What this means in practice is that Dalit Muslims and Christians do not have access to affirmative action policies and programmes that are designed to help people with their social and economic deprivations. In addition, Dalit Hindus who switch religion to become either Muslim or Christian lose their low-caste benefits. In addition to perpetuating group inequity, the Indian reservation system constitutes a disincentive for Dalit Hindus who wish to exercise their freedom to change their religion. In a way, the

system that purports to help Dalit Hindus in fact significantly restricts and constrains the free exercise of their religion or belief.

All this goes to support the point that focusing on economic and social deprivations cannot fully address the root cause of persistent poverty, and material solutions cannot fully address group inequality of the kinds we see in the lives and experiences of marginalised Dalits in India today. Additionally, when group inequities are present, being persistently poor generation after generation cannot be fixed with a narrow and limited understanding of inequalities and discrimination. What is urgently needed is a more expansive understanding of individual freedom rooted in a robust view of the human person. According to development scholar Denis Goulet, the true freedom that must be the goal of human development is achieved when human beings are able to 'be more' rather than simply 'have more' (Goulet 1996). For Goulet, therefore, there can be 'authentic development' only when there is a 'societal openness to the deepest levels of mystery and transcendence'.

Such an understanding of individual freedom and sustainable development, which above all recognises the connection with FoRB, has radical implications. Without such an understanding, why do we see inequity as unjust or even unequal? What is our exogenous standard that compels us to want all people to be treated equally? Is it because economic disparities and social marginalisation have become major topics for discussions of intersecting inequalities, even from the perspective of human rights (UNCESCR 2009)? Or is it, as philosopher Simone Weil wrote in 1943, because we have an unconditional 'obligation' to the dignity and humanity of the human being? Human beings, Weil argued, are designed with an 'eternal destiny' in mind. And it is this eternal destiny that must compel us to have an 'eternal obligation to the human being not to let him suffer from hunger when one has the chance of coming to his assistance' (Weil 1955).

From the data and the analysis above, three findings emerge that are informed and shaped by the seminal work of economist Glen Loury on group inequality and racial disparities among black people in the US (Loury, Modood and Teles 2005). The first finding is that FoRB can help the poor limit and possibly even overcome the effects of enduring and entrenched discrimination. Like black people in the US, Dalits face persistent group inequality that has been sustained over long periods, where individuals from these groups have faced unequal opportunities and systematic discrimination. In India, caste-based hierarchies based on notions of purity and impurity have been in place for centuries (Kolenda and Madan 1981). We suggest that deleterious effects on a person's capability to improve, arising from centuries of sustained exclusion and discrimination, might be overcome by promoting individual freedom that fosters an authentic vision of sustainable development, building on traditional values, particularly religious beliefs and practices that are intrinsic to individuals in these communities. Unfortunately, Dalits, like black people in the US, remain segregated and excluded despite anti-discrimination and untouchability laws. After all, these laws do not undo the legacy of historic discrimination, but merely serve to ensure equal treatment under the law.

It is in the context of such persistent and stubborn patterns of stratification and marginalisation – which laws alone cannot undo – that the poor turn to religious resources. Religious beliefs and practices provide meaning in their lives, a sense of identity, and cultural integrity rooted in religious tradition and community. In the absence of FoRB, there is a danger that segregated and excluded groups such as Muslim Dalits will resort to what Loury refers to with respect to black people in the US as ‘racial sorting’ (Loury 2007). Here, out of fear and a primal need for safety, individuals resort to associating with members of their own kind. This segregation of friendships, networks, neighbourhoods, workplaces, and schools could place a marginalised community at a disadvantage, because it limits people’s social world in a way that has a powerful and enduring impact on the information they receive, the attitudes they form about themselves and others, and the interactions they experience within their community and with the outside world.

Our data illustrates that individuals for whom religious beliefs and practices are an intrinsic and fundamental part of who they are, are more likely to break out of their ‘sorted’ groups, take risks, and develop adaptive and anticipatory capabilities by owning a business and enquiring about the most competitive rates of interest. We find that in general the adverse effects of enduring discrimination do not end when legislation begins. Rather, the consequences of years of segregation and social stratification continue, often unabated, years after they are outlawed. Additionally, as Loury (2007) finds with respect to black poverty in the US, individuals are socially situated and a person’s location within a network substantially influences their access to resources. A Dalit woman’s social network may never hear of a moneylender who is willing to offer an unsecured loan at 8 per cent instead of the usual 12 per cent. A Dalit woman’s inherited social position as someone who must live on the periphery of society plays a key role in determining whether or not she will be able to build resilience and reduce her vulnerability to economic shocks and other extreme events.

In their seminal work on race and ethnicity, with particular reference to the black community in the US, political scientist Sidney Verba and his co-authors Kay Schlozman and Henry Brady find that, on average, individuals who are engaged in the workplace and in non-political organisations have more civic skills, but that these skill sets are more stratified. In other words, minorities such as black people or Latinos who work in low-paying jobs have less of an opportunity to participate in activities that build civic skills (Verba, Schlozman and Brady 2002). However, in cases where black people are active in church, they have a greater chance of gaining civic skills. At the time of writing, religious participation of black people in churches, particularly Protestant churches, was about 60 per cent compared to 48 per cent for white people of comparable socioeconomic status. Thus, as black people spent more time in church, they had a greater chance to acquire civic skills during that time.

Verba’s findings for the black community strengthen and support our findings concerning the importance of communal and particularly religious resources – that is, social and spiritual capital – in determining an individual’s capability to lift themselves and their families out of persistent poverty. Like the black people in Protestant churches who were

able to acquire civic skills in spite of their systematic and long-standing deprivations, Dalits who are actively and personally engaged in their religious communities – as worshippers of the renegade goddess Yellamma, or devout Muslims who choose to fast all through the holy Ramadan season – are empowered and strengthened to seek change and overcome some effects of systematic discrimination.

The findings of Verba *et al.* on the pro-developmental association between black participation in Protestant churches and attainment of civic skills confirms our finding on the vital and even indispensable role of FoRB for individuals, as well as for religious communities, groups and institutions in social contexts such as poor black neighbourhoods in the US and slums in India. Economic development, early childhood development and the attainment of key skills occur mostly in social contexts – within a family or in a neighbourhood or among peers.

However, in contexts where the deleterious effect of historical segregation and social stratification have constrained opportunities for development for Dalits and other marginalised minorities in India, or for black people in the US, religious institutions such as the black Protestant churches in Verba *et al.*'s study of faith-based organisations operating in slums, could enable individuals to gain the civic skills and capabilities they need to help them in their professional and personal lives. Their input could mean the difference between ending up in jail, or owning a business.

Loury argues that social and economic disparities for marginalised minorities are less likely to be understood as a social problem when people see inequity as something that is part of the intrinsic deficiency of the group – as something biological or deeply cultural. For example, a Dalit man who lies drunk on the pavement in his slum, despite numerous attempts to help him overcome his alcoholism, is regarded as someone who is part of a group for whom such visibly disadvantageous activities are taken to be systemic or intrinsic to the group. While discrimination has to do with how minorities are treated both by the law and by society, stigma is concerned with how disadvantaged and excluded minorities are perceived.

In a groundbreaking study on the experiences of Dalit children in school, Bajoria (2014) found that thousands of Dalit Muslim children were not attending school because teachers and students at the school called them 'dirty' (Bajoria 2014). Such discrimination assumes various forms. There is formal, institutional discrimination, which might take the form of refusing a Dalit Hindu woman entry into a temple. Though formally proscribed by the Indian Constitution *de jure*, such institutional discrimination still occurs *de facto*. Caste discrimination also takes the form of pervasive, attitudinal tendencies among members of the religious or cultural majority to regard lower castes or religious and racial minorities as unclean and 'polluting', as well as inferior and with a limited capacity for improvement and development.

When talking about racial disparities among black people in the US, Loury (2007) suggests that biased cognitive processes promote 'an essentialist causal misattribution'. So, when confronted with racial disparity in the US or inequities associated with a religious minority status, observers might be unable to identify with the condition of these groups simply because they believe (wrongly, of course) that this group – these drunken Dalits or

black teenage mothers in southeast Washington DC – are ‘reaping what they have sown’ (*ibid.*).

Here again our data points to the remarkable ways in which individual freedom to access the transcendent – or whatever he takes to be the source or sources of transcendent meaning in the universe (Tollefsen 2018) – can help a broken Dalit man break out of a false narrative about the intrinsic backwardness of his group and seek a different path. Our second finding drawn from our preliminary results shows that under certain conditions, men who belong to significantly disadvantaged and segregated environments, who pray alone privately, who attend religious services at least once a week, and for whom religion is important are less likely to get drunk, smoke, or see women other than their wives or partners.

We found that FoRB may empower individuals to interrogate and transform deep-seated, inherited and socially reinforced beliefs about their identity and belonging, liberating them to move beyond their supposedly predetermined qualities and enabling them to fashion new identities, choices and behaviours. Loury’s work maintains that while it is plausible to hold that material conditions and social institutions can foster certain behaviours in individuals and groups, those behaviours will ultimately depend on what ‘a person takes to be the source of meaning in his or her life’ (Loury 2005).

For this reason, we would suggest that there is significant potential for religious perspectives to provide an expansive and realistic notion of the human person and human development. Denis Goulet, a founder of development ethics, warns that if modern economics – or in our case modern-day development practitioners and policymakers – continue to yield an understanding of human development that ignores how the transcendent powerfully shapes how we act in a situation, then governments and development institutions will persist in acting as ‘one-eyed giants’ who ‘analyse, prescribe, and act **as if** man could live by bread alone, **as if** human destiny could be stripped to its material dimensions alone’ (*ibid.*).

To be clear, we are not suggesting that all religious beliefs and practices are a power for good. Some religious practices, beliefs and networks might operate for ill and might promote inter-group conflict and hatred. Yet, if development practitioners and policymakers continue to regard the marginalised poor as soulless creatures and ignore their freedom to believe in some essential way – their freedom to seek the transcendent and to value what they have reason to value – then our vision of development is unduly limited and narrow; that is, development policies and programmes ought not be formulated in terms that exclude or limit FoRB, even if the targets and instruments adopted and institutions involved in the pursuit of the goal of sustainable development for vulnerable and marginalised communities are themselves religion neutral.

Finally, in the face of growing intolerance and religious restrictions in India, there remains a great opportunity to harness, reawaken, and adapt the rich tradition of religious pluralism. Our third finding points to the powerful way in which higher levels of religiosity are associated with higher levels of religious tolerance and pluralism.

What do Indians lose when they face greater legal restrictions on FoRB through the formulation of anti-conversion laws, or when certain groups of politicised religious nationalists threaten and challenge the deeply held beliefs of religious minorities and restrict their freedom to manifest their religion or belief in teaching, practice or worship? Indians lose a great deal. Indians lose centuries of spiritual and social capital that fostered a powerful pluralising force of religious diversity; that encouraged healthy religious competition where not only Hindus but Muslims, Christians, Jews, and Parsis compared and critiqued each other's traditions, yet in conditions marked largely by peaceful competition. Indians, particularly marginalised Dalits, lose the freedom to 'experiment with truth' – to paraphrase the title of Mahatma Gandhi's great autobiography (Gandhi 1927) – and thus lose the freedom to change, revise and refine their most fundamental beliefs, and thus spur religious reform and challenge traditions and customs that marginalise and exclude them.

There is an opportunity to revive and reawaken the tolerance and freedom that have a long and storied history on the sub-continent. Writing about Muslims in the period before 1915, historian Nile Green describes how distinctive and mutually competitive forms of Islam were produced, nurtured and flourished in Bombay, and in some cases were exported to other parts of the west Indian Ocean. Green (2011) finds that Bombay, which was the industrial epicentre of the Indian Ocean, in 1850 was home to more than 100,000 Muslims from various parts of the region. These included Muslims from Irani, Habashi, Konkan, Pathan, and Bohr communities.

Yet even as a diverse population of Muslims began to grow, the different Muslim groups protected their own distinctive community boundaries. There was no 'single Muslim community, demanding a single formation of their faith' (*ibid.*: 6). Rather, the entrepreneurial Bombay Muslims along with increasing numbers of Hindus, Christian, Jews, and Parsis gathered to create a new kind of religious economy that was 'more pluralistic, competitive, and productive than its pre-industrial predecessors' (*ibid.*: 240). Green maintains that it was around 1915, when Muhammad Ali Jinnah became the president of the Muslim League and promoted a decidedly national and more politicised vision of the community, that Bombay's Muslims 'monopolised' and unified it into a single religious entity.

India is the world's largest democracy and an economic powerhouse. But it is also home to stubborn poverty and some of the world's worst religious persecution, particularly with the rise of a nationalism that adversely affects devoutly religious individuals from the majority and minority religious traditions. Might India's relentless religious repression and stubborn poverty be related? Might an unshackling of the poor to break out of the social straitjackets imposed by caste and certain religious beliefs and practices unleash an economic freedom and dynamism that could lift generations out of persistent poverty? Our preliminary findings indicate how the free exercise of religion or belief can enhance important features of human flourishing among the neediest members of the human family. Through the availability and exercise of religious freedom, the most vulnerable are empowered to exercise self-determination, and become agents of change for the better, with the capability to create opportunities for themselves and their families.

As the Covid-19 pandemic threatens to wipe out decades of progress of poverty alleviation programmes and projects, there could hardly be a clearer case for creating a paradigm shift in development thinking and practice – one that is guided by an invisible hand that ensures that an individual is able to nourish their soul as well as their body.

**Table 4.2 Descriptive statistics of all variables**

Variable	Obs.	Mean	Std. Dev.	Min.	Max.
Knows interest rate	7,637	0.161	0.367	0	1
Owens business	7,622	0.207	3.784	0	99
Gets drunk	7,637	0.110	0.313	0	1
Smokes cigarettes	7,637	0.122	0.328	0	1
Uses violence to control wife	7,637	0.063	0.243	0	1
Religion important	7,612	2.227	1.063	1	8
Attends religious services weekly or more	7,637	0.350	0.477	0	1
Switched religious tradition	7,637	0.035	0.184	0	1
Prays alone	7,637	0.374	0.484	0	1
Fasts for Eid	7,637	0.069	0.253	0	1
Prays to Yellamma	7,560	0.044	0.206	0	1
OK for people to convert	7,637	0.762	0.426	0	1
OK for neighbour to be of different religion	7,637	0.708	0.455	0	1
Female	7,637	0.695	0.460	0	1
Male	7,637	0.304	0.460	0	1
Age	7,634	40.287	12.161	1	98
Married	7,637	0.955	0.207	0	1
Divorced	7,637	0.001	0.030	0	1
Separated	7,637	0.005	0.073	0	1
Single	7,637	0.006	0.078	0	1
Widowed	7,637	0.031	0.173	0	1
Brahmin	7,637	0.006	0.079	0	1
OBC	7,637	0.107	0.309	0	1
Adivasi	7,637	0.142	0.349	0	1
Other caste	7,637	0.014	0.118	0	1
Don't know caste	7,637	0.002	0.043	0	1

Source: Authors' own.

**Table 4.3 Impact of FoRB on dimensions of development (part 1)†**

<b>Variables†</b>	<b>Knows the interest rate</b>	<b>Owens a business</b>	<b>Gets drunk</b>	<b>Smokes cigarettes</b>	<b>Uses violence to control wife</b>
	Logistic	Logistic	Logistic	Logistic	Logistic
Religion is important	0.288*** (0.0527)	0.202*** (0.0752)	-0.167*** (0.0423)	-0.178*** (0.0399)	-0.042 0.048
Switched religious tradition	0.498* (0.254)	0.900*** (0.348)	-0.561 0.471	-0.484 0.403	-0.336 0.437
Attends religious services weekly or more	0.525*** (0.086)	0.036 (0.137)	-0.531*** 0.131	-0.220* 0.121	-0.257** 0.130
Prays alone	0.317*** (0.026)	0.162*** (0.039)	-0.902*** 0.176	-1.003*** 0.162	-0.821*** 0.188
Female	0.121 (0.082)	0.032 (0.125)	-1.588*** 0.081	-1.322*** 0.075	
Married	-1.330*** (0.326)	0.575 (0.734)	0.162 0.642	0.344 0.617	
Widowed	-1.041** (0.370)	-0.126 (0.841)	-1.218 0.789	-0.857 0.729	
Age	-0.017** (0.003)	0.003 (0.005)	0.020*** 0.003	0.018*** 0.003	0.025*** 0.004
Brahmin	2.766*** (0.323)	0.567 (0.610)	0.268 0.419	1.721*** 0.319	0.007*** 0.368
OBC (other backward caste)	0.391** (0.126)	0.734*** (0.161)	-0.329** 0.145	0.091 0.124	0.007 0.194
Adivasi (scheduled caste/tribe)	1.325*** (0.094)	0.149 (0.172)	0.567*** 0.111	0.276 0.112	1.554*** 0.122
Other caste	0.054* (0.302)	0.323 (0.433)	-2.401* 1.011	-0.157 0.361	-1.519 1.008
Do not know caste	-1.110** (1.078)	0.418 (1.058)	1.168* 0.637	2.087*** 0.583	3.390*** 0.584
Number of years in school	0.032*** (0.008)	0.044*** (0.012)	0.021* (0.008)	0.037*** 0.007	0.060*** 0.010
Constant	-0.843** (0.397)	-4.344 (0.813)	-2.739*** (0.676)	-3.026*** 0.650	-4.684*** 0.259
Pseudo R <sup>2</sup> /R <sup>2</sup>	0.1813	0.0439	0.1396	0.1054	0.0719
Observations	7,538	7,498	7,598	7,598	7,261

Notes: † \* > 0.1, \*\* > 0.05, \*\*\* > 0.01, two-tailed test, standard errors in parentheses.

† We also control for survey sampling area and survey length. Some variables had to be dropped from the analysis because of insufficient variation on the dependent variable or because the question was only asked to married men.

Source: Authors' own.

**Table 4.4 Impact of FoRB on tolerant and inclusive societies (part 2)‡**

Variables†	'I would not object to a person of a different religion moving next door'	'Everyone should have the freedom to convert to whatever religion they want to'
	OLS	OLS
Religion is important	0.214***	0.186***
	0.013	0.014
Attends religious services weekly or more	0.065***	0.058***
	0.013	0.014
Prays alone	-0.046***	-0.002***
	0.009	0.010
Married	0.271	0.326
	0.164	0.172
Widowed	0.014	0.107
	0.179	0.188
Single	0.101	0.152
	0.234	0.243
Age	-0.004**	-0.004**
	0.001	0.001
Brahmin	0.606**	0.592**
	0.183	0.195
OBC (other backward caste)	0.975****	0.938***
	0.043	0.045
Adivasi (indigenous caste/tribe)	0.327****	0.954***
	0.039	0.041
Other caste	0.452***	0.823***
	0.109	0.114
Do not know caste	0.142	0.446
	0.297	0.311
Number of years in school	-0.031***	-0.025***
	0.003	0.003
Constant	1.742****	1.604***
	(0.178)	0.198
R <sup>2</sup>	0.1529	0.1681
Observations	7,454	7,454

Notes: † \* > 0.1, \*\* > 0.05, \*\*\* > 0.01, two-tailed test, standard errors in parentheses.

‡ We also control for survey sampling area and survey length. Some variables had to be dropped from the analysis because of insufficient variation based on the dependent variable or because the question was only asked to married men.

Source: Authors' own.

## Notes

- \* This book has been produced as part of the Coalition for Religious Equality and Inclusive Development (CREID) programme, funded with UK aid from the UK government. The views expressed do not necessarily reflect the views or official policies of our funder or IDS. This is an Open Access book distributed under the terms of the **Creative Commons Attribution 4.0 International licence** (CC BY), which permits unrestricted use, distribution, and reproduction in any medium, provided the original authors and source are credited and any modifications or adaptations are indicated.
- 1 Rebecca Supriya Shah, Senior Fellow, Archbridge Institute, USA.
  - 2 Timothy Samuel Shah, Distinguished Research Scholar, University of Dallas, USA.
  - 3 All the names in the study were changed to protect the individuals' identities.
  - 4 The Religion and Economic Empowerment Project (REEP) is a large-scale household study conducted under the auspices of Baylor University in Waco, Texas, and funded by the Templeton Religion Trust. REEP seeks to clarify and quantify the pro-developmental and prosocial outcomes of religion and religious freedom among randomly selected individuals in India and Sri Lanka.
  - 5 In the interests of our enumerators and to protect our partners in the field, we cannot identify the sample areas in our survey. However, we do collect data in Bangalore, which is one of the five sample areas.
  - 6 To know more about our previous research, which in some cases includes a similar group of women to the ones studied for this chapter, see Shah (2013a, 2016a, 2016b) and Shah and Shah (2011, 2013). The data cited in this chapter is also found in more detail in an unpublished report in the author's possession (Shah 2013b).
  - 7 This categorisation of Hinduism began in 1893 at the first World's Parliament of Religions, which took place in Chicago, Illinois. To explore more on the origins and concept of 'Hinduism' as a single world religion, see King (1999).
  - 8 For more on the rise of neo-Hinduism in India, refer to Shah (2018).
  - 9 Consumption smoothing is an economic concept that describes an individual's desire to maximise their standard of living through alternating between spending and saving throughout different stages of their lives.
  - 10 We draw on the work of Banerjee *et al.* (2014) to identify business ownership as a key dependent variable for our study.
  - 11 By deeply held religious beliefs and practices, we wish to distinguish them from levels and forms of religious commitment that are relatively formal, routinised and external, consisting largely, for example, of religious rituals and practices organised on a family or community basis. Think of a person who goes to church every day versus a person who goes to church only at Christmas or Easter because it is the 'done' thing in their family.
  - 12 There are many stories about the origin of the Yellamma cult. The most prevalent one says that Yellamma was the daughter of a Brahmin, married to sage Jamadagni and was the mother of five sons. She used to bring water from the river Malaprabha for the sage's worship and rituals. One day, while she was at the river, she saw a group of youths engaged in water sports and forgot to return home on time, which made Jamadagni suspect her chastity. He ordered his sons, one by one, to punish their mother, but four of them refused on one pretext or the other. The sage cursed them to become eunuchs and had Yellamma beheaded by his fifth son, Parashuram. To everybody's astonishment, Yellamma's head multiplied by tens and hundreds and moved

to different regions. This miracle made her four eunuch sons and others become her followers, who worshipped her head. According to another version, after Parashuram beheaded his mother he felt guilty and attached the head of a lower-caste woman named Yellamma to Renuka's body. Thus, a lower-caste woman achieved the higher status of being a Brahmin's wife. It is also noteworthy to say that originally Yellamma was a divinity mainly worshipped by the lower castes (mostly Dalits) and did not therefore belong to the Brahmanic deities (Gupta 1983).

- 13 In this chapter we use the term Dalit to include SCs. Dalit means 'broken' and is the preferred term of most people in this community. However, the official government term is 'Schedule Caste'.

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## PART 3

# **Tensions Between National Models of Development, Religious Equality, and Respect for FoRB**

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## Chapter 5

# **'We Put God and Drums in the Front': Spirituality as Strategy in an Adivasi Self-Empowerment Movement\*†**

Philip Mader<sup>1</sup>

### **1 Introduction**

'By reviving our culture, we have found dignity and honour, we can dance and sing without fear. Our women are respected now. Earlier we had the status of bonded labourers, now we assert our identity as Adivasis.' This is how one member of 'The Programme', an obscure self-empowerment movement of Adivasis in India, explained the changes she had experienced over approximately 15 years of membership. To understand and explain her experience, and the experiences of many others, this contribution will examine how groups of Adivasis successfully use cultural and spiritual practices to challenge dominant interests, secure rights – especially to land – and empower themselves, despite an increasingly oppressive and hostile political climate in India.

In the contemporary Indian context, Adivasis (together with Dalits) are among the most marginalised and dispossessed communities. Many continue to live in forms of bondage and oppression that have long been outlawed, yet from which it is practically impossible to escape. The Programme intends to facilitate an escape. The organisations involved shall remain anonymous, to minimise the risk of reprisals, and their activities will be referred to only as The Programme (see section 3). This is the first time that The Programme's methods have been evaluated in published research. It has features of both a civil society intervention and an indigenous social movement. It aims to enable people who are trapped in debt bondage to work together in a spirit of solidarity, collectively escape bondage, encroach and settle land, practise subsistence agroecology, and finally gain land titles. At each stage, spirituality plays a central, strategic role.

Spirituality, rather than religion, is the term used by The Programme, often in connection with 'culture' ('cultural-spiritual reconnection'), to refer to invocations of traditional belief systems that are mobilised towards fostering self-empowerment. Self-empowerment as understood here is a process of transformative change, driven by the communities themselves, through which members escape exploitative relationships and gain resources, to enable a self-determined existence.

Spirituality is understood as a wider matter than religion, concerned not with the correctness of dogma or practice, but rather the possibility of

experiencing, or the expectation of, the transcendent and the supernatural.<sup>2</sup> Instead of articulating any particular codified belief system, The Programme weaves its motives, practices and goals into Adivasis' heterogeneous relationships with the transcendent and the supernatural, and thereby makes these relationships strategically expedient.

In brief, as a sketch of what is explained in greater depth below, to facilitate their escape from bondage and enable successful struggles for land rights, The Programme animates Adivasis to reinvigorate traditional cultural and spiritual practices. Both **ideologically** and **practically**, spirituality plays a role that is 'strategic', in the sense of exhibiting intention and purpose in relation to objectives (*cf.* Smithey 2009: 660–61).

**Ideologically**, in The Programme spirituality serves not only to create a sense of positive difference for Adivasis *vis-à-vis* dominant castes and outsiders. It also fosters feelings of strength, pride and the motivation to act collectively.

**Practically**, performing traditional spiritual practices helps The Programme's members to demonstrate the legitimacy and veracity of their claims to rights as indigenous people, with reference to particular openings in Indian rights-based legislation (*cf.* Nilsen 2018b). Culture and spirituality also serve in practical terms as a protective shield and alibi, with religious events enjoying greater *de facto* legal protection than protests, and cultural festivities serving as platforms for engaging high-ranking officials and politicians without being overtly 'political'. Visible displays of Adivasi culture and spirituality furthermore usefully help to distinguish The Programme's activities from those of the staunchly secular Naxalite Maoist insurgency, which the Indian government violently suppresses. Hence, as members of The Programme put it, they reduce the risk of persecution and increase their agency when, instead of chanting political slogans and invoking armed resistance, they put 'god and drums in the front'.

The intended contribution of this publication is threefold. First, for 'insiders', such as activists and organisations working closely with vulnerable groups, I aim to build a greater understanding of how spirituality can enrich strategic action repertoires for self-empowerment, to enable emulative experimentation. The role of spirituality outlined here may be applicable or adaptable in other progressive socio-political empowerment efforts, in India and beyond.

Second, for a wider audience of 'outsiders', including development scholars, social policy experts and civil society actors, in particular those who support or fund social work with vulnerable marginalised groups, I aim to highlight the importance of protecting and creating spaces for exercising freedom of religion or belief (FoRB). FoRB can be a vector for progressive change, when used strategically by vulnerable marginalised groups. However, restrictions of FoRB around the world are tightening, threatening the existence of fragile communities (Tadros 2020).

Third, for a wider audience, particularly actors who can weigh in on relevant policy processes (domestically or internationally), I hope to draw greater attention to the Adivasis' situation. Despite partial successes, like those described here, many remain landless and powerless, are held in debt bondage, and are denied basic human rights and freedoms. Their efforts at self-empowerment are increasingly threatened by reactionary political forces. The recent attention paid to the FoRB of Muslims and Christians in

India has tended to eclipse the qualitatively different yet equally existential threats to the cultural-religious survival of India's tribal peoples.

Section 2 will provide context and background for a grounded understanding of The Programme. It will explain how a modern sense of Adivasi identity evolved through a history of conflicts and political struggles for land and against exploitation and assimilation, and what role spirituality played. Section 3 introduces The Programme and its goals and methods, describing the steps groups typically take on the self-empowerment journey and obstacles they commonly encounter. Section 4 examines in detail how spirituality features in this process. The final section concludes by highlighting how spirituality, thanks to being both innate and malleable, strategically enables action.

## **2 Adivasi political struggles in modern India – a review**

### **2.1 Who are Adivasis?**

Adivasi, meaning 'original inhabitant', is a collective name for the diverse tribal groups of India. According to India's 2011 census, Scheduled Tribes (or STs – this is India's official census designation for Adivasis) make up 8.6 per cent of the national population, around 104 million people, who are concentrated in the states of Andhra Pradesh, Chhattisgarh, Jharkhand, Madhya Pradesh, Maharashtra, Orissa, West Bengal and Gujarat. Taken together, Adivasis, commonly referred to in the Indian context as 'tribals', constitute one of the world's largest surviving populations of indigenous people. Most are traditionally forest dwellers and have animistic religious practices, but have been dispossessed of their ability to access the forest and follow their spiritual traditions, which are inextricably intertwined with the forest.

Within extremely unequal India (Kohli 2012), STs are among the poorest and most marginalised people. STs' Human Development Index values are 30 per cent below the Indian average (Sarkar *et al.* 2006), and they suffer even worse health outcomes than Scheduled Castes (SCs – Dalits, or 'untouchables') (Maity 2017). Many Adivasis live in extreme hardship, not so much outside the Indian economy and society as absorbed into it on the worst, most subaltern and exploitative terms. They are held in debt bondage by landowning dominant caste groups and subjected to pressures to 'Hinduise'. Many have completely lost or are threatened with losing their traditional culture, religion and way of life.

The origin stories of Adivasis and Dalits commonly trace both groups back to the same indigenous South Asian tribes, some of which were subordinated by a supposed pre-historic 'Aryan' invasion as 'out-castes' (Raj 2001: 137), while others continued living in the forests outside or on the fringes of empires.<sup>3</sup> Prior to the 1800s, large regions of the Indian subcontinent 'remained largely outside the ambit of pre-colonial empires' (Kela 2006: 504) and were inhabited mainly by forest-dwelling tribes, whose contact with outsiders was limited but not non-existent.<sup>4</sup> The forest tribes sustained themselves independently via mixed economies that blended subsistence farming with hunting, gathering, and occasional raiding (Kela 2006: 505–6, 521).

British colonial state-building, however, combined more absolute claims to the subcontinent's wealth with more advanced methods for revenue extraction, and accelerated the opening up of tribal lands by outsiders,

a process which has been further advanced by economic development and nation-building efforts in post-independence India. From the mid-nineteenth century through to today, immigration and settlement have ‘produced radical dislocations in traditional Adivasi societies’ as a ‘flood of settlers – moneylenders, landlords, state functionaries, liquor dealers, shopkeepers, traders, farming castes’ (*ibid.*: 510) expropriated tribals, either displacing them further into the forest or assimilating them as subaltern labourers and debtors.

The term Adivasi (original inhabitant) subsumes diverse tribal communities across India, comprising numerous different languages and cultural-religious identities. Tribal people usually identify themselves first as Gond, Bhil, Baiga or Kondh – only some of the better-known peoples living in central India’s ‘Tribal Belt’ – or as members of subgroups of these. And yet:

the term Adivasi (or tribe, indigenous people, aborigines) is not easily dismissed... [V]arious social groups [i.e. tribes] – Bhil, Bhilala, Gond, Santhal, Munda, and hundreds of others whose presence is depicted [as] clusters of ink-spots dotted across the demographic map of India – use the term Adivasi to define themselves as a collectivity to stake claim to material and symbolic resources... Once created, the concept of Adivasi has taken on a life of its own, animated by the complex social practices have accrued around it.

(Baviskar 2005: 5106)

Anthropologists note that it was coined in the 1930s<sup>5</sup> and became popular as an umbrella term ‘out of a common experience of oppression, impoverishment and resistance during the colonial period’, thanks to implying ‘a superior right to land’ *vis-à-vis* settlers (Kela 2006: 509). Some have also questioned whether Adivasis and neighbouring farming castes are cleanly separable, pointing to ‘long histories of cultural exchange’ (Baviskar 2005: 5106) and similarities in their peasant modes of production and cultural beliefs (Hardiman 1995; *contra*: Kela 2006).

Hindu ‘fundamentalists have generally assumed that Adivasis are default Hindus’ (Baviskar 2005: 5107), considering them ‘backward Hindus’ (Ghurye 1959, cited in Bhukya 2008: 108), and hence a part of their imagined India. However, in this ‘caste imaginary’, Adivasis sit alongside ‘low’ castes, as impure and in need of ‘Sanskritisation’ – changing their customs and ritual ideology – to rise socially and spiritually (Bhukya 2008). Both Adivasis and Dalits are similarly subordinated, yet, as Baviskar clarifies:

there is one crucial difference between Adivasis and Dalits: most Adivasis continue to have some access to land, whereas Dalits, as former service castes engaged in ‘polluting’ tasks like sweeping, scavenging, leather-work, cremation, and prostitution, do not. The link to land, especially to forested lands, gives Adivasis a certain cultural cachet that Dalits cannot claim.

(Baviskar 2005: 5109)

## 2.2 Expulsion, exploitation, resistance

The regions of India in which the remaining forest-dwelling Adivasi communities are concentrated are rich in natural resources, ranging from forest wealth to rivers that can be dammed and extractable minerals. The Indian state's national 'development' efforts – from farm modernisation to mineral wealth extraction – have continued to displace and dispossess Adivasi communities, which are often depicted as 'obstacles' to economic growth and national development. Environmental conservation and wildlife protection projects have led to the expulsion of some communities from forests they had inhabited for time immemorial, as part of conservation-induced displacement (Shahabuddin and Bhamidipati 2014), as well as to the imposition of restrictions that render forest-based livelihoods in effect illegal, such as bans on collecting forest products (Baviskar 1994; Shah 2018: 172–75).

A plethora of social and political movements resisting forest expropriation has emerged (and often subsided again). Some movements, such as those involved in the Narmada River dispute,<sup>6</sup> garnered the support of outsiders with an idealised imagery of Adivasis as 'honest and simple' tribal people living in harmony with the forest (Whitehead 2007: 236). The widespread Adivasi rallying cry '*jal, jangal, Jameen*'<sup>7</sup> – water, forest, land – (Kumbamu 2019: 239) emphasises claims to having natural rights as well as knowledge systems and identities that are symbiotic with nature. In resisting displacement and struggling for land rights, Adivasi activists have consciously displayed their indigeneity, making themselves visible to outsiders as 'ecological warriors' and 'indigenous performers' (Krishnan and Naga 2017: 892). Some have also sought to claim rights via more 'modern' articulations of identity, such as class or particular livelihoods; but these have often resonated less successfully with urban political elites and the middle classes than 'arguments embedded in "culture", "tradition", "religion", lifestyle, and identity' (*ibid.*: 894), in which 'spiritual connectedness' to particular localities plays a central role (Kjosavik 2010: 254).

These nature- and conservation-based activist movements have, however, constituted only the most publicly visible ones among a wider range of what Isin (2008) and Nilsen (2018a: 133ff) describe as contentious 'acts of citizenship': deliberate ruptures with existing power structures which serve to assert rights for subaltern groups in relation to the state. Although wrapped up in struggles over natural resources, Adivasis' subaltern position in contemporary India fundamentally is a class relation, and their struggles are class politics (*ibid.*: 260–63). As Baviskar (2005: 5106–7) bluntly puts it: 'To be an *adivasi*... is to be at the bottom of the social hierarchy.'

Adivasis have found themselves thrust into the modern Indian economy as subalterns, often as labour migrants in the lowest-paying sectors (such as brickmaking) or as debt-bonded agricultural labourers working on farmland that was once common forest. The post-colonial Indian state's constitutional designation of Adivasis as STs and its recognition of their historical oppression has led to some measures for affirmative action and special legal safeguards (as for SCs). On the whole, however, these have proved insufficient for Adivasis to attain social advancement within mainstream Indian society, except for a small minority, and then often

only at the expense of abandoning aspects of tribal identity and tribal land claims (*ibid.*; Moodie 2015).

One different, yet equally critical outcome of this fraught relationship with the Indian state, local elites and dominant groups has been the entanglement of Adivasi struggles with the Naxalite Maoist guerrilla insurgency. The insurgency, which began in 1967 with an uprising in the village of Naxalbari (West Bengal), is now ‘the world’s longest ongoing armed revolutionary movement’ (Shah 2018: xiv). Although Naxalites now count possibly as few as 10,000 persons under arms (*ibid.*), Indian political leaders have declared them ‘the most serious threat to national security in India’.<sup>8</sup> The state’s counterinsurgency has been extremely violent, involving mass surveillance and the deployment of armed forces of more than 100,000 soldiers and police alongside local right-wing militia (Shah 2018: xvi–xviii).

Since the 1990s, Naxalite Maoist strongholds have mainly been located in Adivasi-inhabited, poorly accessible forest regions, where some Adivasis have joined the rebel cause. Adivasis now make up more than 90 per cent of the Maoist rank and file (Kumbamu 2019: 236) and, as the ethnographic study by Shah (2018) documents, some young Adivasis in Maoist-affected areas move fluidly between rebel camps and tribal villages. The Naxalites’ egalitarianism and autonomism match Adivasis’ own communitarianism and aspirations for greater self-government (*ibid.*: 20–24).

Sociologists have evaluated the partnership between Naxalite insurgent leaders and Adivasi supporters as ‘competitive state-building’, whereby the Maoists, whose leaders often hail from urban, non-Adivasi backgrounds, have constructed parallel governmental structures in tribal areas, which challenge the Indian state (Kennedy and King 2013: 36). Naxalite groups have provided some social services (such as schools and health camps) and incorporated Adivasis’ political struggles for land and against exploitation into their ideology and praxis, in effect recognising and cultivating among oppressed Adivasis a potentially revolutionary peasant class.

Naxalite leaders organise festivals commemorating Adivasi anti-colonial rebels as heroes. In areas under their control, they restore Adivasi families’ access to *mahua* trees, whose flowers are essential to artisanal alcohol production. Yet while Adivasi tribal self-empowerment efforts and the Naxalite struggle share some goals and personnel, tensions and discontinuities between the two movements also exist, and far from all Adivasis support the Maoists. Some aspects of Adivasi culture and tradition, especially concerning alcohol consumption and sexuality, also incur the disapproval and reformist zeal of Maoist leaders (Shah 2018: 140–42, 149–52).<sup>9</sup>

Only a very small share of Adivasis has actively joined the insurgents,<sup>10</sup> but the Naxalites’ reliance on ‘Adivasis, as well as other supporters, to provide them with resources, such as food, shelter, recruits and intelligence’ (*ibid.*: 25) has led hostile elites and political actors to often conflate Adivasi self-assertion with insurgency. Those who campaign for tribal causes or challenge local power structures risk being branded as Naxalites. To minimise the risk of such ‘guilt by association’, The Programme has made its activities visibly ‘religious’ and ‘cultural’ rather than ‘political’, as described in sections 3 and 4.

### 2.3 Forest rights and cultural rights: recent political gains and setbacks

Indigenous culture enjoys some level of legal protection in India. However, this legacy from prior progressive legislation is currently under threat from legal and political challenges, as well as a cultural drive for the Hinduisation of India led by the Sangh Parivar collective of Hindu-nationalist organisations, which recognises Adivasis (unlike Muslims and Christians) as native, but paints them as 'backwards' and in need of spiritual reform and cultural assimilation. The rule of the Congress-led centre-left United Progressive Alliance (UPA) coalition, from 2004 to 2014, brought hopes and progress to Adivasis' political struggles; the rule of government of Narendra Modi, since 2014, a range of setbacks.

The UPA catered to subaltern voters with a series of legislative initiatives that enshrined civil liberties and expanded socioeconomic rights, while, however, eschewing more substantial acts of redistribution (Nilsen 2018b). A crucial initiative was the Forest Rights Act (FRA),<sup>11</sup> which came into force in 2008. Passed by the coalition government in 2006, and co-written by tribal activists, the FRA was 'radical in many respects': it not only acknowledged historical injustices, but also practically stipulated that any land 'encroached' or held by STs before 2005 should belong to them (Kumar and Kerr 2012: 758f).

The FRA is one of the main legal instruments used by The Programme. Following decades of struggles to ensure or restore customary access to land, forests and natural resources, the FRA finally provided a legal route. It recognised the claims of individuals and groups belonging to STs, as well as 'Other Traditional Forest Dwellers' dependent on forests for their subsistence (Dlugoleski 2020: 227) as legitimate, with STs only being required to prove that, as of December 2005, they occupied and depended on the land. Others had to prove residence for at least three generations.

The Act thus clearly privileged claims made with reference to indigeneity, 'on the basis of religion or distinct spiritual practice' (*ibid.*: 239). Under the FRA, claimants can claim forest rights – land titles and rights to forest produce – either as individuals or as communities. In addition to rights, forest dwellers were also given duties to protect and conserve the forest, its wildlife and biodiversity. The FRA diverged from prior legislation based on colonial forest laws, which fundamentally conceived of protection as 'protecting the forests from the people for whom it was a habitat' (Nilsen 2018a: 72), and whose designation of previously common land as 'state forest', especially in the Indian Forest Act (IFA) of 1927, meant that:

forest dwellers living in these designated areas could often only meet their basic livelihood needs with the assent of the (often corrupt) state forest bureaucracy. Moreover, because these lands now belonged to the state, they could be evicted at any point. (Dlugoleski 2020: 224)

The FRA was passed in 2006 against the opposition of powerful conservation organisations and the Indian forest bureaucracy, which had presided over a 'wave of evictions' since 2002, which displaced as many as 300,000 forest dwellers from their homes as part of 'urgent measures to

combat deforestation and protect the remaining tree cover' (*ibid.*: 221–22). In spite of the FRA's provisions, the IFA has remained in force, as has the 1972 Wildlife Protection Act, 'which reserved large areas of land for wilderness, allowing for little to no human presence' (*ibid.*).

This has created a tenuous legal balance. According to data from the Ministry of Tribal Affairs, as of April 2019 nearly 4.1 million **individual** forest rights claims had been lodged across India (of which 46 per cent led to land titles) and 148,818 **community** forest rights claims (of which 51 per cent led to land titles). Still, progress was judged as too slow in 2016 by a committee appointed to assess the implementation of the FRA, with state governments and local authorities often holding up the processing of rights claims and distribution of land titles (Newslick 2019).

Recently, the FRA has been threatened with complete dismantlement following legal action brought by conservationists and forest bureaucrats. Two rulings by the Supreme Court of India, in January 2016 and February 2019, ordered the eviction of rejected FRA claimants. However, the enforcement of both eviction orders was indefinitely stayed (Campaign for Survival and Dignity 2019). Rather than directly questioning the rights the FRA granted to STs, the petitioners – a coalition of wildlife activists, conservation-focused non-governmental organisations (NGOs) and retired forest officials – alleged that the FRA had enabled 'bogus claimants' to gain land and destroy India's forests.

The Supreme Court rulings stipulated that forest dwellers whose claims had been rejected – usually, in practice, by local councils dominated by non-Adivasis or forest officials – should be evicted. This would have displaced over 9 million people. After nationwide protests, an enumeration exercise to assess the reasons for claims having been rejected was launched.<sup>12</sup> As of mid-2020, with a final decision by the Supreme Court still pending, the status of the FRA and those whose rights it was designed to protect remains in limbo (Löw 2020).

The political climate for Adivasi (and Dalit) communities has also worsened significantly under the right-wing Hindutva-inspired regime of the Bharatiya Janata Party (BJP) since 2014. Modi and the BJP were re-elected in May 2019 with a large majority. The BJP is part of a larger family of Hindu nationalist organisations, the Sangh Parivar, spawned by the Rashtriya Swayamsevak Sangh, a paramilitary volunteer organisation that draws inspiration from figures such as Adolf Hitler, which aims to remodel secular India as a culturally and religiously homogeneous *Hindu Rashtra* (Hindu Nation).

Physical attacks on Dalits, Adivasis, Muslims, other minority groups and women have increased since 2014. They have included public lynchings undertaken by mobs animated by BJP affiliates, whose victims are often members of marginalised communities, particularly Muslims and Dalits accused of having eaten or sold beef (Gowen and Sharma 2018).<sup>13</sup> In a climate of shrinking civil society space, Indian security forces have gratuitously used anti-terrorism charges such as 'sedition' and 'anti-national activity', which can carry whole-life prison sentences, to intimidate activists and dissenters (*cf.* Human Rights Watch 2016). At the time of writing (January 2021), one of the members of the research team whose work made this study possible

had been imprisoned for more than nine months, facing vague and spurious charges related to protests against the regime's policies.

Adivasis' responses to the shrinking political and civic space in India have comprised both greater assertions of political autonomy and defence of existing citizenship rights. Some Adivasi villages in Jharkhand in 2018 began erecting *Pathalgadi* (large stone plaques and signboards) proclaiming local autonomy and forbidding outsiders and security forces from entering their territory, and holding demonstrations armed with traditional weapons, such as bows and arrows (Tewari 2018).

The Pathalgadi movement combines references to legal provisions for local self-government under the Panchayats Extension to Scheduled Areas (PESA) Act (1996), which are inscribed on the plaques, with tribal traditions of erecting stones in memory of the community's ancestral spirits, as territorial markers.<sup>14</sup> Adivasis have also been at the forefront of protests in Delhi and various state capitals to uphold the FRA, some of which members of The Programme have helped to organise. Adivasi groups and individuals have continued to make forest rights claims under the FRA, although in vastly reduced numbers: only 20,847 new individual and 525 collective claims were made between January 2019 and January 2020.<sup>15</sup>

#### 2.4 The role of spirituality in Adivasis' struggles

Questions of culture and identity are and have been central to Adivasis' struggles against displacement and for land rights, which, in turn, have been 'constituted by and constitutive of' Adivasi identity (Kjosavik 2010: 249). But how does spirituality, specifically, feature within these land struggles? The rest of this chapter will explore this in detail in the specific case of The Programme, but not before gleaning four summary takeaways from the literature.

First, Adivasis intimately associate their origins and ways of living with the forests of India. As Kujur (2001: 16) puts it: 'Land is central to the tribes' existence. Without land they simply do not exist. In absence of land there is no space for their social, cultural, economic and ecological life.' The forest, hence, is a sacred resource. As Borde (2019: 554) highlights, thanks to the identification of forest land as sacred, 'Adivasi religiosity as a whole is gaining a platform from which [the Adivasi movement] can voice demands for politico-legal recognition.'

Second, this Adivasi attachment to land or forest(s) is not abstract, but an attachment to 'their' own unique land and forest, and the struggle for land constitutes a 'concrete politics of place' (Kjosavik 2010: 252), which assigns significance to sites and territories. As one Dongria Kondh Adivasi, quoted by Krishnan and Naga (2017: 884), explains: 'We can live only because of our mountain. He is our God. We worship him.' Adivasi belief systems, as documented by scholarship, locate ancestral spirits in features of the land, which makes their connection to the spiritual realm unalterably place bound and territorial.

Anthropological evidence suggests that tribal spirituality (as documented in central-Western India) undergirds an intricate 'territorial system' of agreements between tribes, watched over by a 'territorial god' and administered by shamanic individuals (*Budwanta*) who coordinate 'with deities, souls, justice system, and community members'

(Mahendra Kumar 2018: 8). Each village has a territorial god, living ‘at its geographical boundary’, who ‘protects and looks over the region’ (Narendra 2017). As Kujur (2001: 22) says, ‘the world of the ancestors’ is understood by Adivasis as ‘copenetrating’ with the visible world; hence, ancestors are ‘not thought of as living in far away places, since they dwell in the huts of their nearest relatives, in streams, rivulets, fields, and mountains of their villages’. This creates in Adivasis a ‘longing for land... not only for their physical existence but also for their encounter with the supernatural forces’ (*ibid.*: 13, 23).

Third, the spirituality motivating land struggles is a **non-Hindu** spirituality. Innately, among Adivasis, it is felt that ‘tribal culture will remain unique and independent’ only by distancing itself from ‘Brahmanical practices as far as birth, death, marriage and rituals are concerned’ (Mahendra Kumar 2018: 6–7). This differentiation from Hinduism is also a practical, strategic one: scholars and other observers have noted how ‘[a]sserting an indigenous identity by naturalising the connection between Adivasis and their environment was a powerful way of claiming sovereign rights to natural resources’ (Baviskar 2005: 5109). Such framings of ‘Adivasis as nature’s conservators’ may even increasingly require them ‘to “perform” the roles ascribed to them’, for instance through engaging in overtly public and photogenic displays of reverence for the spiritual value of the forest (Krishnan and Naga 2017: 887).

Faced with expectations of being “ecologically noble savages” (or increasingly, not savages at all, but savants), Adivasis hence may ‘perform’ spirituality, at times ‘self-consciously (and sometimes, with irony) [and] pandering to hegemonic cultural expectations in order to gain their own ends’ (Baviskar 2005: 5110). Some studies have suggested that the ‘re-articulation of Adivasi identities’ as more spiritual, ecological and territorially attached ‘micro-identities’ – i.e. small tribes attached to specific locales (Kjosavik 2010: 245) – has been more successful than other ‘politics of representation’ based on, for instance, citizenship rights or economic needs (Krishnan and Naga 2017: 893).

The FRA, which privileges indigeneity as a source of legal rights, in effect even requires applicants to demonstrate their entitlement via performances of: ‘a somewhat exotic culture, of spirituality and primordial bonds with “nature”, for an audience which demands precisely that. Practices which “seem to be tribal” are showcased, in the process embellishing, amplifying and even inventing culture’ (Krishnan and Naga 2017: 888). At the same time, showcasing ‘Adivasi-ness’ also helps activists visibly differentiate indigenous assertion from Naxalism and more opportunistic demands for resource redistribution, both of which engender more hostile responses from authorities and local elites.

Fourth, and finally, how spirituality informs Adivasi struggles in practice is not pre-determined or automatic, but malleable. To recognise the malleability is not to imply anything ‘cynical, opportunistic, inauthentic’ (Baviskar 2005: 5110),<sup>16</sup> but rather to acknowledge the choice and agency in Adivasi self-assertion. This indeterminacy is perhaps best illustrated by cases that fail to fit the established mould; for instance, as Krishnan and Naga (2017: 886, 889) report, some Kutia Kondh Adivasis articulated their resistance to a mining project as ‘farmers and fisher-people’ who deserved

compensation for their lost livelihoods, rather than outright rejection. But the demands of other tribes, who emphasised a more 'primordial, spiritual connection with nature', were ultimately privileged by media reporting and judicial rulings, and were accorded greater protection from the mining project's harms.

In other cases, as Baviskar (2005) finds, Adivasi activists have formed electoral alliances with Hindu supremacists, founded on shared (but qualitatively different) claims to indigeneity in opposition to a 'hated Other'. Hindu supremacists' claims to indigeneity are about erasing centuries of Muslim and Christian presence on the subcontinent, whose presence irks them more than that of Adivasis, whom they casually treat as 'default Hindus' or 'backward Hindus' (*ibid.*: 5107):

On most counts, the claims to indigeneity made by the Hindu Right are starkly different from the claims to indigeneity made by Adivasis fighting against displacement by a large dam. Hindu indigeneity legitimises the violent exclusion and subordination of religious minorities... Yet there is one disturbing common element in these widely divergent invocations of indigeneity... The assertion of cultural ties to land.  
(*ibid.*: 5110)

This sketch has established and explored the importance of identity and the role of spirituality in Adivasi land struggles. The next sections, in which The Programme is introduced and evaluated, will explore more how innate spirituality is used **strategically** to enable land struggles and self-empowerment.

### 3 Description of The Programme

In order to assess how spiritual-religious practices ideologically galvanise Adivasis for action and practically help to mitigate threats and overcome resistance, this section and the next will re-analyse qualitative data collected through a comprehensive evaluation. The bulk of data was collected in workshops, interviews and visits to multiple villages during a period of intensive field research undertaken by a team of researchers (a lead researcher, a research assistant and an agricultural expert).

The Programme's methods have never previously been evaluated or scrutinised in published research. To protect the identities of persons involved and avoid divulging information that could be used against The Programme and its members, extensive steps for anonymisation have been taken. No locations, dates or names are disclosed. Some of The Programme's attributes and methods are described only in very general terms.

#### 3.1 Background, reach and general features

The movement referred to here as The Programme encompasses more than 100,000 members and their families living across India's Tribal Belt. It is just one small initiative (or linked set of activities) on the sprawling tapestry of subaltern politics, mobilisation, self-assertion and rights-claiming in India (*cf.* Nilsen 2018a: 4–7). The activists working in The Programme explicitly and exclusively target people who live in rural areas, own no

land and are held in debt bondage by local elites – some of the poorest and most oppressed people in India. The overwhelming majority of members are Adivasis, but a smaller number are Dalits and an even smaller number are Siddis (Indians of African descent). The focus in this chapter is on The Programme's work with Adivasis.

People who join The Programme are accompanied by an animator, who initially assists them in forming a group with like-minded neighbours. Animators are mostly, though not all, recruited from the member base itself. They are selected based on experience, motivation and natural leadership skills. They work under the aegis of local NGOs. Prospective members typically live in conditions of extreme disempowerment, as bonded labourers, when they are first approached by The Programme's animators (or when, in some cases, they approach animators after having become aware of nearby groups' activities).

Bonded labourers are unfree workers held in a personal (rather than impersonal capitalist) patron-client relationship that contains elements of both oppression and mutuality, but which is undergirded, if necessary, by naked force (Lerche 1995: 487–88). Being held in debt forces them to work for near-starvation wages, usually performing fieldwork for the local landowner, to whom they owe money and who is their only or primary source of income. This income will never suffice to repay the debt. The landowners often also own, or have *de facto* control over, the labourers' sites of residence. Having practically no assets or alternative income-earning options, any extraordinary expense, such as a medical bill or urgent travel, inexorably leads bonded labourers deeper into debt. These facts make them economically completely dependent on – hence, bonded to – employer-creditor landlords.

The self-empowerment process bonded labourers go through with The Programme is uncertain and inherently fraught with conflict with both their 'patron' and other authorities. According to animators' estimates, it typically takes 10–15 years for members to become fully and sustainably self-sufficient, with land of their own, though not all groups are ultimately able to complete this process. The process also involves a variety of legal instruments and intricate steps of organisation-building (which are left out of this discussion, in order to focus on aspects of spirituality and not divulge details which could endanger The Programme's work).

The Programme traces its origins back to the 1980s, when labour struggles led to Supreme Court judgments that not only ordered the release of bonded labourers who (under previous legislation) had not been correctly identified as bonded, but also accorded compensation and rehabilitation to freed labourers (Xaxa 2007: 31–39). Various approaches and phases of experimentation led to The Programme's current combination of methods, applied in this form since roughly the mid-2000s, when the connection with traditional cultural-spiritual practices and the emphasis on non-market, subsistence-oriented livelihood strategies became central. This focus on self-sufficiency and self-identification as **Adivasis**, we were told, emerged out of conversations with elders, who saw it as offering alternative pathways away from both markets/'modernity' and Naxalite Maoism, at a time when struggles between the Maoists and the Indian state were flaring up across the Tribal Belt and new programmes of market

inclusion (particularly microcredit) targeted marginal populations. As one of its founders explained to us: 'The Maoists were showing guns as a way, we began showing the *mandar* [traditional drum] as the way.'

### 3.2 Goals and methods

The Programme's overarching aim is for people to lead self-determined lives, free of bondage and exploitation. In this chapter, the process towards this is referred to as 'self-empowerment', a term which inevitably understates the significance of things such as escaping multigenerational debt bondage or gaining a secure home, but avoids the hyperbole of terms such as liberation or emancipation. The key goalposts of this self-empowerment process are freedom from debt bondage and obtaining land titles. Land is the principal source of economic and social power in rural India, and being able to inhabit and farm one's own land (as a group) is understood to be the prerequisite for Adivasis gaining and maintaining their economic self-sufficiency and cultural independence.

When a new group is formed, the first goal is financial: to build up savings to overcome debt bondage. The Programme's animators talk to and quietly organise a small cadre of leaders who gradually bring neighbours together to meet at regular intervals. The group discusses collective problems and collects small amounts of cash and grain, to build up a collective savings fund, from which members can borrow when facing hardship. As the fund gradually grows, groups become less dependent on employer-creditor landlords, can collectively bargain for better terms of work and eventually completely repudiate debt altogether. In effect, the collective fund enables groups to escape usurious debts by never repaying them. Members are also instructed to stay away from other forms of debt, such as microcredit.

Once groups escape bondage, they can set their sights on a higher goal: to gain their own land, which they pursue through several steps.<sup>17</sup> First, they identify some nearby land, usually forest or government-owned 'waste' land, which is suitable for farming. When the group feels sufficiently strong, it begins to encroach upon the land by clearing vegetation (usually enough acreage to feed the members' families) and planting agricultural crops. Cultural and spiritual symbols such as sacred stones are erected or identified and marked on the land. Group members may build temporary structures, primarily to serve as meeting places, even before they own the land.

When local authorities and dominant caste-Hindu actors become aware of the encroachment, they usually respond with hostility. They issue threats; physically attack encroachers; let their cattle run through crops; call the police or other authorities to evict them; or lodge competing claims of ownership. Members of The Programme are forced to defend the land, sometimes using physical force or counter-threats, and may call upon other groups from surrounding areas to help them keep their opponents at bay.

Second, The Programme helps groups submit a legal land rights claim, under the FRA, to local authorities, which are often wary and hostile. Claims may be held up for years by *gram panchayats* (village councils), which are commonly dominated by caste-Hindu landowning groups, and which may refuse to process a claim. In such cases, groups can exert pressure by organising demonstrations, lobbying higher-up officials, lodging legal

cases to break the deadlock, or getting their own members elected to the *panchayat*. Groups can also work together and mobilise collectively to expedite several land rights claims held up in different villages by taking their cases to politicians in the district headquarter or state capital city.

For an FRA land rights claim to succeed, it is crucial that the claimants be recognised as claiming ancestral land. Visible signs of indigeneity and place-boundness are important and can include spiritual sites and markers on the land, engaging in cultural practices that are ‘typical’ for Adivasis and farming the land in traditional ways. From what we learned, it matters less that claimants claim land they currently live on than that they can demonstrate they are already exercising rights to the forest (i.e. subsisting from the land) and that their ancestors had a claim to it.

Third, when groups finally gain land tenure or anticipate gaining it (even after the claim has been approved, the handing-out of titles may be delayed for years), group members begin to move their families onto the new/regained land, build permanent dwellings, and apply for amenities such as water and electricity. As, in effect, a new village consolidates, The Programme’s animators gradually reduce their support, but remain in contact with the newly independent group. The Programme places a strong emphasis on groups continuing to hold regular meetings, to maintain their capacity for collective action. It ensures land titles are issued as documents of collective ownership, in order to prevent individual members selling or mortgaging land, falling back into debt, or drifting towards market-oriented agriculture.

Beyond enabling freedom from bondage and rights to land, The Programme has a number of secondary goals, which are themselves seen as important parts of the self-empowerment process:

- 1 **Food sovereignty** is a precondition for the process. Groups’ savings of cash and grain initially enable them to break the cycle of economic dependency on landlords. Growing their own crops is the next step towards full self-sufficiency. Along the way, accessing government food transfers and income-generating schemes helps (see point 3).
- 2 **Agroecology** and subsistence-oriented farming are heavily emphasised. The animators ensure groups plant traditional, indigenous seeds, which are seen as more robust and beneficial than commercial ones. Rejecting commercial seeds, fertilisers and irrigation means members can avoid paying exploitative prices or incurring debt for farming inputs. The use of traditional seeds and methods also demonstrably underscores members’ indigeneity. However, low yields and harder work may be a price paid for keeping farming traditional and simple.<sup>18</sup>
- 3 **Access to welfare:** The Programme assists its members with gaining identity cards and registering for state welfare programmes. The Indian government has a variety of welfare and subsidy schemes, but lack of documentation and other barriers can prevent poor people from accessing them. Particularly in the early stages, before members harvest their own crops, government rice distribution systems, health services and employment schemes (especially the massive NREGA<sup>19</sup> public works programme) enable greater independence from landlords.

- The Programme also has a diffuse emphasis on **gender equality**. Groups are always mixed gender, and leadership is generally shared by men and women. Gender equality is pursued less through deliberate interventions and instead seen as an inevitable result of restoring traditional Adivasi values and ways, which typically entail men sharing housework and women participating equally in community life. Debt bondage and exposure to Hinduism are seen (within The Programme) as the primary causes of gender-based inequality and violence. While it is true that there is 'relative gender equality' in Adivasi societies and women enjoy greater levels of 'social, sexual and economic freedom' than in caste-Hindu and Muslim communities (Shah 2018: 31f),<sup>20</sup> the assumption that improvements in gender relations will automatically follow from a return to tradition may prevent The Programme's animators addressing residual or unrecognised gender inequalities. In our workshops, questions about more active measures for women's empowerment were generally dismissed. It was noticeable that male animators spoke disproportionately.

### 3.3 Security and secrecy

The Programme's activities confront the entrenched power of landlords and what Nilsen (2018a: 29ff) calls the 'everyday tyranny' of local elites and authorities, whose extraction of bribes and tribute payments deepen Adivasis' subordination. When challenged, these power-holders inevitably react. The Programme has always faced threats of backlash and opposition at local level, coming from various sides, depending on local context, including landlords-cum-creditors, government officials, the armed Indian Forest Service (unofficially often known as the Forest Department), police, army, mining companies, moneylenders and microfinance institutions (MFIs),<sup>21</sup> Hindutva activists, upper-caste groups, traders, and politicians.

In the research process, many animators and members we met told us harrowing stories of run-ins with law enforcement agencies and violent thugs linked to landlords and local elites, and sometimes showed us physical scars. One animator had survived three attempts on his life. Another told us: 'Four of us, we were caught and locked in a room once, only when more people from the neighbouring groups came to rescue us, the landlords got scared.'<sup>22</sup> Another said: 'When one village leader came to help us to reach out to more bonded labourers, he was shot dead in 2016 by the landlord's *goondas* [hired thugs].' Others explained that MFIs (which are often run or staffed by members of the landlord class) routinely target The Programme's savings groups with loans, and when rebuffed, often threaten to attack animators or pull strings to have members' government benefits revoked. Others told us about villages in conservation areas where forest officials had deliberately released tigers and elephants to scare the residents into leaving: 'We have refused to vacate, we have told forest officials let the animals eat us, we will die but not leave the land.'

During a research team visit organised by leaders of The Programme,<sup>23</sup> we witnessed an arson attack perpetrated by local elites against an Adivasi group, residents of a tiny village<sup>24</sup> who had only joined The Programme several months prior to our visit. Representatives of the local landlord somehow became aware of our presence and dispatched a team of people to

intimidate 'his' bonded workers and chase us outsiders away. The landlord's men threatened those present and started a fire nearby, fuelling the flames to spread them to the village. The research team was forced to flee.

Three families' huts were burnt to the ground, and their residents lost their shelter and their belongings. Five young Adivasis were injured in an ensuing violent altercation with the landlord's agents. The Programme's local animators called the police, who dispatched officers to camp out overnight and temporarily ensure safety and order. The animators filed a 'caste-based atrocity' report, to be prosecuted in court. The same village had already suffered an arson attack a few months earlier.

The Programme has more recently grappled with the closing civic space across India. Like a growing number of authoritarian governments, the current BJP government has particularly targeted human rights groups, social movements and organisations of marginalised people, and foreign-funded civil society organisations (*cf.* Hossain *et al.* 2018). Adivasis' and other marginalised groups' self-assertions are not only a political and economic challenge to entrenched rural power structures and systems of exploitation, but are also seen as a cultural challenge by the increasingly radicalised Hindutva movement. As a result, organisations supporting Adivasis are subject to surveillance efforts and obstruction, including observation by national intelligence services.

The Programme and its members have responded by further lowering their already low profile. Without an apex organisation or a country-wide name, the organisational form is amorphous and opaque. The organisations and groups that comprise it are genuinely autonomous, although they may undertake coordinated actions when needed. Other self-assertion movements by Adivasis have aimed for public visibility and symbolic victories – there being a sense, in some cases, that the 'success of [the] struggle was the struggle itself' (Kunhaman 2003, cited in Kjosavik 2010: 258) – whereas The Programme's achievements are not advertised. Symbolic victories are discounted, while less-visible practical achievements are preferred. The success of The Programme's methods depends partly on the methods not being fully understood and its successes potentially not being fully recognised by its adversaries. The activities on the ground are, as much as possible, presented as or allowed to look like spontaneous acts of self-empowerment by groups of Adivasis (or Dalits or Siddis), rather than outcomes of a concerted programme. This may be as much about minimising The Programme's exposure as about reinforcing members' sense of **self**-empowerment.

The Programme's animators, who mostly come from the target communities, can blend into the local social tapestry, and travel inconspicuously on foot, bicycle or motorbike. Larger gatherings are avoided altogether or are planned to coincide with cultural festivals or religious ceremonies, which they blend into. Some activities that entail greater formal visibility, such as pursuing court cases or high-level lobbying, are handed over to like-minded organisations.

Representatives of The Programme also cultivate, as much as possible, positive relationships with power-holders, such as higher political or bureaucratic office-holders (who may be called upon for protection and assistance) or, in some regions, even with Naxalite rebel groups.<sup>25</sup> Despite

the overall efficacy of these tactics, however, there have been situations that have led The Programme to temporarily withdraw from an area due to intolerably high threats to its animators' and members' lives.

#### 4 The Programme's strategic use of spirituality

##### 4.1 How does The Programme animate Adivasi spirituality?

The exact form of the spiritual 'reconnection', as we learned from our interviews and discussions with animators, depends on the local circumstances and reflects Adivasis' widely differing tribal identities and practices. It is usually rekindled by a small number of people to start with and gradually the whole community joins in. In some cases, traditional spiritual practices are still alive, or can be recovered from members' living memories or neighbouring groups. Groups seeking spiritual reconnection may visit other villages or attend larger events at which traditions are celebrated. The Programme's wide reach also means that important artefacts and objects – from the hand-crafted *mandar* drum,<sup>26</sup> which is essential to many Adivasis' rituals, to traditional seed varieties – can be obtained and exchanged within its networks.

In other cases, like the Adivasi populations in India's northeastern states, who were uprooted from central India more than a century ago and brought to Assam as bonded tea plantation workers, key traditions have been lost or forgotten. In these cases, animators launch a process of rediscovery in discussion with community elders, analysing the community's documented history, and searching for physical clues or evidence in the vicinity and among the group's possessions. During our research, we were astonished to learn how Siddi groups – whose forebears were transported to India from East Africa several hundred years ago as slaves – had rediscovered spiritual traditions and found their 'old gods' through a combination of community-based explorations and archival research led by an NGO. At one key moment, 'folk songs took them back to a river in Mozambique', we were told.

Notwithstanding the wide diversity of traditions and spiritual practices, our field visits and interactions with animators revealed a core set of traditions and practices that, at least for Adivasis, typically play a major role in The Programme's work.

- **Drumming and dancing:** many Adivasi rites involve rhythmic drumming accompanied by hymns and dancing, which can lead one or more members into trance. This trance is seen as a way for the community to communicate with the spiritual realm.<sup>27</sup> After groups have begun spiritual reconnection, they usually accompany their formal meetings with a religious ceremony, led by (if available) traditional priests or healers, and playing the *mandar*. Aside from being open to all members, and visibly spreading joy among the participants, singing and trance reinforce ethno-cultural identity. As we saw, these also very practically allow leaders and animators to introduce agenda-setting messages or remind members of collective duties, in the guise of hymns. For instance, we observed an animator chanting this line repeatedly: 'We must meet every week, we must build the organisation [*sangathan*].'

- **Priests and healers:** having a priest or healer is part of cultural self-assertion, and creates a personalised office that embodies authority and enables otherwise highly egalitarian tribal societies to reach decisions for action more effectively. It can also promote gender equality, as women can be priests, too, and are seen as having complementary – and in some domains superior – spiritual knowledge (cf. Borde 2019). In the areas we visited, we learned that male priests lead religious ceremonies (and play the *mandar*), but a woman priest is seen as equally important and ceremonies cannot take place without her. Dancing, singing and going into trance visibly involve women and men equally. Both genders dance together.
- **Recognition of traditional gods and spirits:** in Adivasi culture (as noted in section 2) gods and spirits are often bound up with particular territories and demarcate them, to the extent that they have been termed ‘territorial gods’ (cf. Mahendra Kumar 2018). They manifest in particular features of the land, often stones, and can be located and ‘rediscovered’ on forest land, motivating community members to encroach it. Documenting the presence of an indigenous community’s territorial god and ancestral spirits, in turn, supports its FRA land rights claim.
- **Production and consumption of particular foods:** consuming forest products such as tubers and berries, hunting small game, and eating beef all differentiate Adivasis (as well as Dalits, who eat beef, too) from mainstream/upper-caste Hindu society, where such foods are culturally proscribed as ‘impure’. Designating particular foods as part of Adivasi/Dalit heritage underscores the claim and sense of being culturally different. Making use of the forest for hunting and gathering in turn reinforces land claims, both intrinsically and extrinsically.
- **Consumption and production of alcohol:** Adivasis across India produce and consume artisanal alcohol made from forest products, most famously *mahua* wine, distilled from *mahua* tree flowers. By contrast, alcohol consumption is disavowed by many high-caste Hindus (and Muslims) – at least officially. Adivasis often celebrate the consumption of homemade alcohol as part of their cultural heritage and spiritual life (Begrich 2013).<sup>28</sup> At meetings of Adivasi groups that had participated in The Programme for at least several years, we were always warmly welcomed with *mahua* or other homemade alcoholic drinks. As one animator told us: ‘You will know that a village is part [of us] if people greet you saying *Jai Johar*<sup>29</sup> and if you get *mahua*.’

These spiritual elements of The Programme, which emphasise rediscovery and celebration of Adivasi traditions, are used consciously and deliberately to drive the self-empowerment process.

First, to state the potentially obvious, although it may be hard for outsiders or non-believers – such as this author – to fully comprehend, spiritual practices have effects on Adivasis which they experience at a spiritual-religious level. They contribute to motivation to undertake particular struggles, especially for land, and to persist when encountering resistance, as was described to us by animators using expressions such as ‘giving strength’, offering ‘divine protection’ and facilitating ‘healing’.

Shared spirituality helps to build a sense of collective solidarity and mark Adivasis out as non-Hindus. It reinforces Adivasis' distinctness, giving them pride in a separate identity, and moving them out of the subordinated and stigmatised spiritual position in the Hindu caste hierarchy, which many are likely to have internalised (Baviskar 2005; Nilsen 2018a: 43ff). Gaining a more positive sense of self in this way implies a significant positive psychosocial impact *per se*, while also practically reinforcing attachment to land and forests. Moreover, in being less masculinist than Hinduism, Adivasi spirituality may particularly empower women and create greater equality within groups.

Second, and from the perspective of outsiders easier to comprehend and describe, The Programme's reconnection of Adivasis with their traditional spirituality promotes and protects specific practical aspects of the self-empowerment process, as discussed below. It publicly legitimises claims for rights, especially land, because the FRA privileges claimants who can demonstrate 'traditional' tenure. It also helps to visibly differentiate The Programme's activities from 'godless' Naxalism or other forms of political assertion that elites may see as more threatening. Instead of organising protests, spiritually reconnected Adivasi groups can organise religious festivals, which are less likely to be attacked, yet which also present opportunities to liaise with high-ranking officials and politicians about 'political' issues.

#### 4.2 How does spirituality support specific aspects of the self-empowerment process?

Spirituality, as laid out here, plays a central role in the self-empowerment process animated by The Programme. It cannot be reduced to a feature or a method, but rather is a strategy that permeates many aspects to varying degrees, though not all (e.g. the savings activities launched in the early stages of self-empowerment are largely 'secular'). The Programme's **strategic** use of spirituality is most clearly visible in three domains: providing motivation and ideology; helping construct an indigenous identity for securing rights; and offering protection and disguise. Although these three are interconnected in practice, they can be distinguished here for purposes of explanation and illustration.

##### 4.2.1 Providing motivation and ideology

The Programme's animators explained to us a number of its different components – such as acting collectively as a 'tribal' unit, engaging in agroecological farming, and seeking land rights – as reflecting innate features of Adivasi identity and spirituality. The use of indigenous seeds and traditional farming methods are articulated as assertions of a more 'natural' and nature-respecting Adivasi way of life (while also being presented by The Programme's leaders as excellent adaptations to anthropogenic climate change). Similarly, land rights struggles are motivated by the deep-seated Adivasi attachment to the forest and its products, and the belief in the unique spiritual value of specific places – the 'territorial god' – in particular. Groups' egalitarian, collective inclusiveness (including relative gender equality) is also understood as reflecting innate tribal norms and a

return to the ways of the spiritual ancestors. Groups are animated to decide things by consensus, farm collectively, share produce equally and so on.

The cultural and spiritual reconnection facilitated by The Programme thus helps to reinforce the more worldly goals of The Programme, as well as differentiating its participants from other parts of Indian society. It underscores a positive, alternative sense of identity – as Adivasi, Dalit or Siddi people, respectively, with their own cultures – that members can valorise. This enables them to reject Hinduism (as much a religious belief system as a set of moral-social codes that assign higher or lower positions in society) and to counteract increasingly aggressive Hinduisation efforts aimed at bringing non-Hindus into the fold. The veneration of their separate culture and spirituality gives Adivasis, who are often stigmatised as ‘backward’ or ‘savage’, an ideological support structure for their self-assertion **as** Adivasis, in much the same way as appeals to class consciousness may do for other political movements.<sup>30</sup>

No doubt these essentialisations could, in other scenarios, amount to caricaturing Adivasi culture. Yet, in the context of The Programme, they crucially enable Adivasis to challenge extremely negative alternative essentialisations – as backward people, inebriates, sub-Hindus and so on – and equip themselves with a more positive and agentic sense of self. In the face of overwhelming traditional power wielded by landowning Hindu groups, spirituality furnishes members of The Programme with a sense of confidence, unity and healing.

This ideological-motivational potency of spirituality was vividly demonstrated to the research team in the aftermath of the arson attack described above. In a disturbing scene in a workshop the next day, a female animator collapsed and writhed on the floor, screaming that she could feel the fire which burnt down the huts on her own body, that she was burning, and that she was very scared and unable to cope with her fear. Her colleagues determined that she was ‘possessed’ by spirits. The eldest healer among the group gathered other animators around and began assuaging the spirits with a hymnic declaration that, with the power of god, ‘our people will come out of bondage, but only if we strengthen our spiritual connection, only if we respect our forest and lands’. The animators chanted and sang songs until her breakdown subsided. After a break, the meeting was able to turn to questions of strategy, specifically how to respond to the arson attack. Both the individual animator’s spiritual experience and the assembly’s collective spiritual response visibly strengthened the animators’ resolve on that day.

#### 4.2.2 Constructing indigeneity for rights claims

The FRA, which was designed to give ownership to people who have ancestral land claims, is the central legal instrument through which groups participating in The Programme can currently obtain land titles. Groups’ cultural and spiritual ‘reconnection’ via religious rituals and their demarcation of religious symbols, such as boundary stones, makes their ‘Adivasi-ness’ visible and buttresses their claims as indigenous owners of the land. Leaders of The Programme explained to us that the enabling role of spirituality in FRA claims was initially ‘co-incidental’, but it has increasingly become a centrepiece in their land rights strategy.<sup>31</sup>

Groups' claims to traditional ownership are strengthened by their use of indigenous, non-commercial seeds and farming methods. Arguably, therefore, agroecological farming is first and foremost an enabler of land ownership, rather than land ownership enabling farming. This seemingly paradoxical relationship – farming first, land second – makes sense in three ways. First, by not needing expensive inputs, agroecology is an affordable, low-risk – though also potentially low-yield – way to grow food, which members can undertake as soon as they begin to encroach on land: they need no further resources.<sup>32</sup> Second, when groups engage in farming that is visibly different from that in surrounding communities, it helps to underscore their 'Adivasi-ness' (Oskarsson and Sareen 2020), which strengthens their FRA application. Third, The Programme's leaders expect subsistence-oriented agroecology to counteract the draw of market forces. Adivasis who farm only for their own subsistence using non-commercial (or not commercially viable) crops are seen as at a lower risk of losing land or falling back into exploitative relationships with 'outsiders'.

As a research team, we repeatedly asked about how the commitment to agroecological methods is imbedded in members, and were surprised to find that neither members nor animators seemed to believe any sensitisation or convincing to be necessary. This suggests it is an attitude that may, perhaps, be reinforced by The Programme, but genuinely prefigures it. When questioned, members and animators forcefully argued that agroecology<sup>33</sup> was superior to other forms of farming in various ways. Both ordinary members and animators insisted that agroecology had only advantages and no disadvantages, and pointed us to various nutritional or health benefits (which we could not objectively verify). They claimed that mainstream seed varieties ('government rice', 'hybrid') were bad for people's health.

As one member, who had participated in a government-run agricultural training scheme, said: 'Farming is easy; we just follow the ways of our elders. We didn't learn anything in particular [from government training] last year, but we got various [traditional] seeds.' They also explained that agroecological subsistence farming reflects the cultural and spiritual norms of their community. As various members told us, agroecology uses 'old leaders' traditional knowledge' in order 'to secure the territorial spirit'. Animators portrayed it as restoring sovereignty and dignity via control over their own natural resources:

*Adivasi culture and agriculture is not for earning money or more income, Adivasis want to live.*

*Adivasi[s] used to be in the forests, but during colonialism they introduced all these laws which made it difficult for Adivasis to access the forests and products, hence we have to evolve and do agriculture, but this agriculture has to be done in the Adivasi way.*

Sowing the crops is also accompanied by religious activities: 'After putting seeds, we notified that this is our land. We did the worship on our land. We take care of the crops, did a *Puja* and notified [the authorities of our presence].'

#### 4.2.3 Offering protection and disguise

An increasingly important strategic purpose of spirituality in The Programme is to package its members' activities so that they appear less threatening and are harder to suppress, at least under existing Indian legislation, which protects heterogeneous forms of religious expression (a fact the BJP seeks to change). At a practical level, The Programme's cultural-spiritual messaging helps to visibly dissociate its activities from Naxalite activities. While it is not known to what extent any of The Programme's members and animators sympathise with the Naxalite (and Pathalgadi) movements' aims, they have evidently disavowed such insurgent, confrontational methods.

Animators explained how spiritual activity was, at times, a deliberate tactic: 'If they call us Naxalites, we do a gathering of healers and put *Deuta* and *mandar* [god and drum] in the front'; 'When we celebrate a religious festival and invite officials, they can't brand us easily as Maoists.' In one instance, during our visit to a village, we met with members on their encroached land. They showed us their traditional weaponry. Animators quickly intervened and reminded the group that, if authorities were to suddenly arrive, this weaponry could incriminate the group and the meeting. The bows and arrows were quickly removed and deposited some distance away, by a small shrine deeper in the forest, where they in effect became 'cultural artefacts'.

Large cultural-religious festivals and events, organised to celebrate Adivasi culture and spirituality, can also serve as a non-confrontational platform for meetings with government authorities and to build relationships. Officially, such regional-scale festivals are of a cultural and religious nature, focused on singing, dancing, eating and drinking. State- and district-level politicians, government officials and media are invited; and because several thousand Adivasis (all potential voters) from as many as 100 villages may attend, officials and politicians can hardly ignore or refuse the invitation. They are fêted as guests of honour and invited to partake in the celebrations, while also being indirectly shown members' organisational strength, and petitioned with requests for support, which they are usually obliged to respond to with assurances or promises. As animators told us in the workshops, the religious festivals' messaging is successful on multiple levels:

*The invitation card with our organisation's name<sup>34</sup> is our strength. Because we are a big organisation, they listen to us, we negotiate, we go to them, we tell them why we are inviting them, how it will also benefit them.*

*The MLAs [Members of State Legislative Assembly] or officials who come become 'our' people, we make them sing and dance with us, they eat our food and drink mahua, we give them Bura Deuta's blessings too.*

*Through these festivals, the state comes to know that we are organised, they get to know that we are strong.*

*When we did not do such festivals, our identity was not known. Now everyone knows about us: government, TV channels, and general public has come to know about our Adivasi culture, our gods, our issues.*<sup>35</sup>

Animators and members shared examples of such rallies having led to greater respect; being given priority in administrative offices; officials becoming more pliable; police arrests and harassment by Indian Forest Service officials declining; and good relationships with authorities at higher levels having helped overcome unresponsive or unsympathetic lower-ranking officials.

Smaller festivals may also be organised at the local level, often not to impress or to make demands, but rather to respond to localised threats. For instance, if a group faces imminent eviction from a piece of encroached land, a small event may be organised, bringing together 100 or more people from groups in the local area, making removal of the encroaching group more difficult. Singing, dancing, food and drink change the nature and optics of the situation. It is much more difficult for police to justify an attack on a 'religious' gathering than the arrest of participants in a demonstration organised by purported Naxalite sympathisers.

Officially, the NGOs that constitute The Programme no longer engage in 'advocacy', instead using different labels for any sort of political engagement. The Programme's efforts at selective and strategic visibility – with its members manifesting, as circumstances require, sometimes as savings groups, as religious devotees or cultural celebrators, and only rarely as protesters or petitioners – have been instrumental to its survival and continued success, despite the increasingly hostile post-2014 environment. Throughout our workshops and site visits, animators and members reiterated the value of having cultural-spiritual platforms on which to liaise with authorities and defend claims to rights. As one animator explained: 'Even the constitution says we cannot be thrown out of our lands if there is spiritual and cultural connection, and the police cannot attack us, as it would be a religious atrocity.'

## **5 Conclusion: strategic spirituality as both innate and malleable**

As this chapter has shown, first in general terms and then specifically in the case of The Programme, spirituality features centrally and strategically in (some) Adivasis' struggles for rights and self-empowerment. Adivasis define their distinctly non-Hindu identity and attachment to land through their association with the forest and spiritual connection with specific places, as is well documented by scholarship. Yet the spiritual and identarian significance of forest land for Adivasis hardly ever automatically or inevitably translates into effective, let alone strategic, action towards maintaining or gaining land and other rights. As we have seen here, through the prism of The Programme, the strategic significance of spirituality lies in **ideologically** galvanising and motivating members; and **practically** protecting and enabling action. Most members are not fighting to hold onto threatened land, but rather to regain land that was lost. To enable this, they are 'reconnected' to belief systems that emphasise land rights as the basis for a self-sufficient and empowered existence.

Where successful, the cultural-spiritual reconnection is as much a process of rediscovering old connections to the forest through the spiritual realm as one of discovering new ways to connect with the forest and the spiritual realm. On the one hand, The Programme works ‘with’ the cultural-spiritual ‘grain’. As one animator (one of a small minority of non-Adivasi animators) explained:

*When we go to Adivasis, we don't say don't smoke or drink or don't eat this thing. If we embrace their culture, they will tell me things about their culture, this is how we enter into their lives and cultures. To mingle with Adivasis, we will have to adopt and embrace their culture.*

On the other hand, the animators in The Programme also deliberately rework Adivasi spirituality into something that is more useful for collective self-empowerment – both ideologically and practically speaking – than would be, for instance, an emphasis on the mystical or on redemption in the afterlife. As one of The Programme’s founders explained to us in an interview:

*Community elders and healers recognised reinvigorating Adivasi culture and spirituality is what would lead people to forests and land, and away from what the neoliberal market economy was luring people into. I hence do not agree with the development rhetoric of letting target groups do whatever they want. There has to be an ideological and political vision and direction.*

The songs and incantations – some composed by animators – we heard in ritual celebrations often merged the practical with the ideological-transcendent. They contained evidently non-traditional elements, emphasising things such as strengthening the organisation.

What is **strategic** about how The Programme ‘resurrects’ culture and ‘reconnects’ Adivasis with their spirituality is that it aims not to find or recover what was originally lost, but rather to discover and build what is needed for the present: the pragmatic combination of existing – or, where lost, reconstructed – cultural-spiritual practices with ones that are creatively repurposed and repositioned to serve modern, worldly ends, such as supporting an FRA application, holding a festival-cum-rally, distributing seeds or accessing NREGA work.

This redirection of spirituality towards clear objectives is what makes it a multi-functional enabler of **strategic** action. The raw material for spirituality to become strategy already exists, but the material must be moulded into shape. This understanding steers clear both of romantic essentialisations of Adivasis as inherently, unreflexively wrapped up with nature; and of cynical tendencies to dismiss performances of indigeneity as ‘inauthentically’ pandering to hegemonic cultural expectations. It highlights how culture and spirituality have strategic value precisely when they are recognised as both innate **and** malleable and worked into action repertoires of ‘[e]veryday shrewdness and canny use of customary arrangements’ (Chandra 2013: 55).

In conclusion, first, I wish to suggest that activists and organisations working with other vulnerable marginal groups can learn from this how to use spirituality strategically in enabling processes of self-empowerment. In The Programme's work, even for those Adivasis who have lost reasons to hope, spirituality helps by both ideologically empowering them and practically/instrumentally enabling action. Recognising, rediscovering or repurposing features of spirituality that are malleable towards progressive ends – such as an apparently innate cultural-religious preference for agroecology, which motivates land rights claims as well as furnishing evidence for them – may enable other organisations and activists working with vulnerable marginal groups to make greater practical gains. How this works will, inevitably, look very different in different contexts.

Second, for all contexts, the findings here underscore the importance of protecting and creating spaces for FoRB, both as a right in itself and as a potential vector for progressive change. As recent research indicates, international donors often struggle to successfully advocate for FoRB. Yet even in delicate political situations, there are alternative pressure points, such as protecting intangible cultural heritage, including cultural-spiritual practices, which governments may perceive as less intrusive than direct advocacy on behalf of religious minorities (Tadros 2020).

Third and finally, this chapter also highlights, in the Indian context, how much is at stake for India's 104 million Adivasis. International audiences are rightly concerned about the real and present threats to other religious minorities in India, but are often unaware of the threats to tribal peoples' FoRB. Notwithstanding the importance of small victories and subtle, strategic actions they can undertake themselves, tribal groups in India need greater international support and solidarity.

## Notes

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- † I am gratefully indebted to Mariz Tadros, Alf Gunvald Nilsen, Paddy and Cathy Holden, and several anonymous others for their feedback, expertise and corrections on earlier versions of this chapter, which was published after consultation with the IDS Research Ethics convenor, Jackie Shaw. I am furthermore grateful for the support from the CREID research programme, which enabled this publication.
- 1 Philip Mader, Research Fellow, Institute of Development Studies, University of Sussex, UK.
- 2 Clear conceptual and empirical engagements with the relationship and differences between spirituality and religion can be found in MacDonald *et al.* (2015) and Zinnbauer *et al.* (1997). By way of reflecting on my own positionality as researcher, it is worth noting that I am an agnostic atheist, and this research project was my first encounter with Adivasi spirituality. I take no positions for or against the veracity of any spiritual claims or

- experiences explored here. My aim is to articulate how references to the supernatural and transcendent may inform and enable actions in the earthly world.
- 3 Nilsen (2018b: 59–63) suggests that a process of gradual, partial incorporation occurred, which also generated political and economic interdependencies between tribal societies and outside empires.
  - 4 Kujur (2001: 21) mentions that by 1628 some Adivasi villages were coming under the control of Hindu revenue collectors ‘who were courtiers in the palace of the first tribal king’.
  - 5 Probably by a social worker and advocate for tribal peoples, who was also a highly visible member of the Indian National Congress (Moodie 2015: 183).
  - 6 The Indian government’s plan to construct a series of 30 dams funded by the World Bank (which has been partially completed), and the resistance by tribal groups and ecological activists to the flooding of large forest areas in Gujarat and Madhya Pradesh, raised the international profile of Adivasis’ struggles for rights and recognition.
  - 7 A slogan also used widely in The Programme.
  - 8 As the then prime minister, Manmohan Singh, declared (BBC News 2007).
  - 9 The movement of people and ideas between Adivasi communities and Naxalites, and the relationships and submerged ideological tensions that emerge, are central themes in Alpa Shah’s fascinating *Nightmarch* (Shah 2018).
  - 10 Based on the above-quoted estimate of there being 10,000 armed Naxalites, less than one in 10,000 Adivasis would be a Maoist rebel.
  - 11 In full: The Scheduled Tribes and Other Traditional Forest Dwellers (Recognition of Rights) Act, 2006.
  - 12 As India’s *Economic Times* reported, contrary to the petitioners’ assertions that the FRA was widely abused, ‘only a few hundred illegal squatters’ were found among the two million rejected forest rights claims (Sharma 2019).
  - 13 The persecution of Christians and other religious minorities has also increased. Several states have passed ‘anti-conversion’ laws to make ‘forcible conversion’ to a new religion illegal.
  - 14 Memorial stones on the graves of ancestors, known for instance to the Munda Adivasis as *sasan* or *sasandiri*, designate a site as sacred (Chandra 2013).
  - 15 Calculated from the Ministry of Tribal Affairs’ monthly updates on the status of the implementation of the Scheduled Tribes and Other Traditional Forest Dwellers (Recognition of Forest Rights) Act, 2006.
  - 16 To be clear, Amita Baviskar does not allege this herself; she paraphrases.
  - 17 In practice, the steps narrated separately here all overlap. They are described separately for simplicity.
  - 18 The agricultural expert in the research team was concerned that the use of minimal technology, combined with no efforts to improve seeds or learn new practices, would keep members poor. To his chagrin, he found animators and leaders in The Programme unwilling to consider even simple productivity-enhancing techniques.
  - 19 National Rural Employment Guarantee Act, 2005 (NREGA).
  - 20 A stark contrast is that Adivasi women are free to enjoy the consumption of alcohol, such as *mahua* wine, whereas most caste-Hindu women are not (*cf.* Shah 2018: 211–22). Survey data also indicates that, in stark contrast to SCs, there is no significant difference in male vs female infant mortality among Adivasis and ST women face fewer gendered impediments in accessing health care (Maity 2017).

- 21 Because The Programme explicitly animates its members never (again) to borrow from external sources.
- 22 Well-established groups often maintain links with other groups in the area and remain in contact using mobile phones.
- 23 Our fieldwork schedule was closely controlled by leaders of The Programme, who decided which locations were to be visited and at what times, and made arrangements with local animators.
- 24 A dozen or so semi-permanent huts, constructed among the ruins of a disused Indian Railways facility, by tribespeople who had been displaced from their ancestral forests less than a generation ago to make way for mango orchards, in which they now worked as bonded labourers.
- 25 When working in rural majority-Adivasi areas, in which Naxalite Maoists often have an active presence, contacts with the Maoists are unavoidable. In one region we visited for our research, we were accompanied at all times by a liaison person. We left when the liaison informed us that the rebels could 'no longer guarantee our safety'.
- 26 In Hindi-speaking regions; similarly known as *maandar*, *maadar*, *maander*.
- 27 On several occasions, we witnessed group members going into trance while dancing.
- 28 Shah (2018: 149–50) also reports that this distinguishes Adivasis from the often teetotal attitudes of Naxalite cadres, who often come from urban higher-caste backgrounds.
- 29 Instead of the Hindi '*Namaskaar*'; '*Jai Johar*' is a salutation in praise of Mother Earth used by Adivasi communities in central and eastern India.
- 30 As Lerche and Shah (2018) point out, relations of race, ethnicity, caste, tribe, region and gender 'conjugate' with class in India as bases of oppression, and hence also shape (and at times undermine) collective struggles to overcome oppression.
- 31 How The Programme made cultural-spiritual expressions a factor in its FRA claims lends credence to the proposition by Nilsen (2018b: 663) that, 'whether rights-based legislation can be made to serve counterhegemonic ends or not depends, most fundamentally, on how [a] new legal regime is appropriated'.
- 32 Several animators, only slightly paraphrased, said of the traditional seed varieties: 'you just throw it on the ground and it grows'.
- 33 Members in the Hindi-speaking areas referred to it as *desi kheti*, roughly translated as 'traditional farming'.
- 34 Associations of Adivasi groups may register as organisations with a formal identity. These are separate from The Programme itself.
- 35 It is possible that this is an ambivalent outcome, in terms of engendering greater hatred and disapproval from Hindutva activists, as a price to be paid (under the conditions of Indian identity politics) for the enhanced resource access and participation rights which come with recognition.

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## Chapter 6

# Sustainable Faith and Livelihoods: Promoting Freedom of Religion or Belief in Development\*†

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### 1 Introduction

In 2016, the South African Human Rights Commission (SAHRC) hosted a National Hearing to investigate the underlying socioeconomic challenges of mining-affected communities in South Africa. The report's findings revealed a significant potential for the infringement of cultural and other human rights as a result of inappropriate practices that are carried out by mining companies (SAHRC 2016: 84–85). The removal of ancestral graves during the development of Medupi Power Station in Lephalale in the province of Limpopo drew outrage from faith communities and civil society who regarded the process as a violation of people's human rights, and shines a light on the contested nature of the development of South Africa's coal industry. Freedom of religion or belief (FoRB) is a fundamental human right guaranteed in the Constitution of the Republic of South Africa, Act 106 of 1996, and it underlies peaceful, stable, and inclusive societies. However, such recognition is often overlooked and undermined by current mining practices in the country, despite its regulatory framework<sup>3</sup> and international industry guidelines for development projects. The Medupi Heritage Impact Report commissioned by Eskom in 2015, which drew on the professional judgement of experts, concluded that 'financial compensation alone cannot adequately deal with emotional issues and belief systems. It may be considered alongside a package of other measures including good communication, education and healing programmes for trauma' (Mbofho Consulting and Projects 2015: 21–22). In this study, land dispossession, and mining-induced dispossession is explored through the lens of FoRB and its intersection with other human rights.

The mining sector and the government of South Africa point out that mining is essential for economic development, but they fail to acknowledge that mining comes at a high environmental and social cost, and often takes place without adequate consultation with, or consent of, local communities (groundWork, Centre for Environmental Rights, Human Rights Watch and Earth Justice 2019). The removal of graves as well as the related land ownership debates surrounding mining communities bring up for scrutiny developments that could be religion-blind through the disregard of African religious or cultural beliefs. Further, this study focuses on the

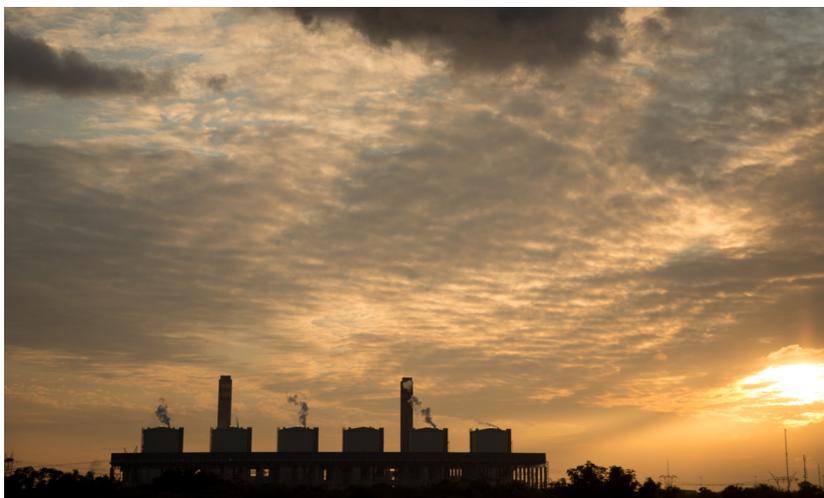
experiences of faith communities in Lephalale, Limpopo and the extent to which the coal-mining industry and development is sensitive to religious rights. This research is situated in relation to the international debate on ‘religion-blind development’ and the shift towards more religion-aware or inclusive development (Tadros and Sabates-Wheeler 2020). Contemporary debates surrounding FoRB have assumed greater public significance as religious communities struggle with – and at times fight over – not only their identities in religiously competitive public spheres, but also their very survival in the context of fragile states (Hackett 2011). Tadros and Sabates-Wheeler (2020) argue that the relationship between FoRB and development continues to be severely underexplored in the literature, despite the copious body of scholarship that distinctively deals with each separately.

This enquiry is guided by the central research question: ‘what are the struggles and opportunities for integrating freedom of religion or belief into development or humanitarian programmes?’. Earthlife Africa<sup>4</sup> and the Southern African Faith Communities’ Environment Institute (SAFCEI)<sup>5</sup> are well positioned to conduct this study as both are already involved in education and advocacy work that aims to advance the plight of coal-affected communities in Limpopo. Against this backdrop, this research is complementary to the fieldwork, training, and policy interventions organised in collaboration with the Life After Coal campaign,<sup>6</sup> of which Earthlife Africa is a founding member.

The structure of this chapter is as follows. First, we state the problem, then in section 3 we review the background and historical context of coal mining in South Africa, and in section 4 we outline the methodology. In section 5 we examine the challenges of mining within the context of FoRB and section 6 explores the opportunities for integrating FoRB, including reference to the national Just Transition. Section 7 presents a concluding summary.

## **2 Statement of the problem**

Human rights debates in Africa have largely excluded the question of religious freedom, and even the question of whether this category includes indigenous or minority religions (Hackett 2011). During the public meetings hosted by Earthlife Africa’s coal campaign to push back coal developments in Limpopo, issues regarding religion and belief surfaced. Earthlife Africa’s Education Officers learnt that faith communities from Lephalale and the surrounding areas of Limpopo, were experiencing challenges because they were unable to exercise or practise their rights of FoRB. This has manifested through challenges of access to sacred land<sup>7</sup> and natural resources<sup>8</sup> being depleted by coal developments, therefore impacting cultural rituals and practices of African traditional religious communities. The findings of our fieldwork proved that various faith communities in Lephalale were not fully consulted on decisions taken regarding the ongoing coal development projects in the area. Coal development has been deeply contested and debated globally, and despite recognising its economic contribution in the country, there is still a disjuncture between its intended impact and the lived reality of many of South Africa’s mining-affected communities (SAHRC 2016: 7). The value of documenting and analysing the possible impacts of coal developments on faith communities is critical to the broader study of



Medupi Power Station in Lephale, Limpopo.  
Photographer: The Dollie House. © IDS.

religion, and its intersections with race, class, and socioeconomic issues, as it allows us to better understand concepts such as political agency or freedom and questions of how agency is imagined and who gets to imagine political agency in the context of FoRB. Moreover, this study questions who decides what kind of beliefs deserve state protection. Further, this research enquiry is an effort to drive real change in the industry, particularly in a time where the world seeks to phase out fossil fuels, and to meet the nationally determined contributions agreed between 194 countries in the United Nations Framework Convention on Climate Change (UNFCCC) 2015 Paris Agreement.<sup>9</sup>

### 3 Background and context

Lephale is considered the heart of the Bushveld and a major tourist and game-farming area. Before coal mining was brought to the town, the agricultural sector was the biggest employer. Interestingly, communities of Lephale do not describe the town as a mining community; rather, they dismiss the claim that the Waterberg is the next coal frontier in South Africa.

At present, the major economic activity in Lephale is attributed to coal mining (Exxaro's Grootegeluk mine) and electricity production by the country's power utility, Eskom. Lephale hosts two of South Africa's major power stations: Matimba Power Station and Medupi Power Station. In South Africa, over the past few years, there has been an increase in resistance to mining development from workers, trade unions, small-scale farmers, civil society, and environmental activists due to health concerns, low wages or limited job prospects for locals, poor living conditions, inadequate community consultation, and a lack of accountability within the sector. The SAHRC's report found that the government was responsible for the harm done to mining-affected communities because of its 'failure to monitor compliance, poor enforcement, and a severe lack of coordination' (2016: 81). We remember the 44 lives that were taken in the Marikana Massacre in August 2012. In this light, the Marikana Commission of Inquiry

identified the need to gain a deeper understanding of the underlying causes and lived realities of mine workers and communities, which contributed to, and provided the broader context to, Marikana (*ibid.*: 8). However, it was also recognised that these challenges were not limited to Lonmin's Marikana Mine, but were illustrative of systemic issues in the industry and related to more deeply entrenched social, economic, cultural, and political realities faced by mining communities in South Africa (*ibid.*).

In their previous and current practices in Lephalale, through the issue of grave removals, coal-mining enterprises display a general disregard for cultural and religious rights, and the African traditional religions' affiliation to land that grounds social relations and livelihoods. Over the past 23 years, South Africa has established a comprehensive regulatory framework to enable its mining industry to operate in a manner that protects and promotes the wellbeing and safety of communities affected by its operations (*ibid.*: 1). In agreement with the SAHRC, 'the framework is designed to facilitate sustainable and equitable development of South Africa's mining industry, while enabling and promoting inclusive growth and prosperity' (*ibid.*).

Coal-affected communities are already vulnerable, due to the lack of access to basic resources, clean environments, and the negative health impacts of coal mining. According to the Living Conditions Survey (LCS), Limpopo was listed as one of the provinces with the highest headcount of adult poverty at 67.5 per cent, with the poverty gap and severity of poverty measures being larger for female-headed households (Stats SA 2018: 15). *Boom and Bust in the Waterberg*, a report published by the environmental justice non-governmental organisation (NGO) groundWork and written in collaboration with Earthlife Africa, tracks the development and environmental injustice of the Grootegeluk mine and Eskom's Matimba and Medupi power stations in Lephalale over more than 50 years (Hallowes and Munnik 2018). It reports that rather than creating jobs and stimulating economic development in the region, these 'development projects' entrenched poverty and unemployment. Section 5 of this chapter, which analyses mining within the context of FoRB, will reveal possibilities as to why these developments failed and what can be taken away from that experience.

People's lives are threatened by the health impacts of coal mining and the threat of violence against those who oppose coal mining. During the research-initiated meeting held in Lephalale on the second day of the fieldwork, community activists raised some of the issues they had personally experienced. One participant said:

*I have personally received death threats as a way of discouraging my advocacy about community struggles. By God's Grace the threats so far have not been actualised. The threat to life as a result of emissions from the power station is real. One just needs to go to the clinic and you will find the most common complaints are related to respiratory infections. In my opinion, threatening influential local leaders is part of the plan to ensure development of mines and building of more power stations continues through the 'backdoor'. Therefore, public representatives agree to ensure the*

*process commences with no signs of protest and resistance from affected communities.*

(Community activist, Marapong meeting, 3 March 2020)

Community activists, especially, continue to live in fear, as well as those at the mercy of corporations, which provide them with jobs, and people who are living on privately owned land.

The State of the Province Address by Limpopo's premier, Chupu Mathabatha, identified mining, agriculture, and the proposed Musina-Makhado Special Economic Zone (MMSEZ) as the key upcoming economic drivers, stating that 'mining and ancillary services dominate our provincial economy at a 25 per cent contribution to the GDP' (Ledwaba 2020). However, Mathabatha also said,

despite a dominant sector in the provincial economy, jobs in mining had decreased from 106 000 to 86 000 between the 4th quarter of 2018 and the 4th quarter of 2019. The province had recorded a marginal improvement with regard to economic growth. Statistics show that the economy has been growing at an average rate of 1% in the recent past. (*ibid.*)

The Waterberg District was projected as a key growth point in Limpopo, with a focus on economic growth and employment creation. Furthermore, Limpopo hosted a Provincial Stability Summit in Polokwane last year. The main objective of the summit was to ensure stability in the province during elections, and to review current strategies and plans to ensure provincial stability. The summit was held under the theme, 'An Industrialisation Path towards Creating Sustainable Jobs and Poverty Reduction for Limpopo Province', and it aimed to review recommendations from Working Groups (a consortium of representatives of labour, business, and civil society) as a basis for adopting a detailed Limpopo Action Plan, towards job creation and poverty reduction. The result of these summits shows a clear over-prioritisation of economic transformation at the expense of local culture, and the subsequent undervaluing of the informal sector/business development skills and experiential learning. In addition, social capital and social connectedness is considered a meaningful factor for vulnerable and marginalised groups to buffer against deeper vulnerability, and foster belonging, learning, and assisting, which could be mutually beneficial to the government and the general public (Townsend and Wilcock 2004). From this standpoint, informal economy occupations have the potential to contribute not only to economically viable livelihoods, but also to meaningful livelihoods and wellbeing for society's most marginalised individuals. Government support and development programmes ought to echo the principle 'nothing about us, without us'.<sup>10</sup> The injunctions of the constitution on human freedoms as articulated in the Bill of Rights (Chapter 2), Act 106 (Constitution of the Republic of South Africa) outlines that 'everyone has the right to freedom of conscience, religion, thought, belief and opinion'. The bill further echoes the necessary imperatives of any developmental agenda.

It is within the context of this economic strategy that the disregard for freedom of religion and faith practices, including indigenous culture and traditions, occurs. New coal developments continue to be proposed within the government's Integrated Resource Plan (IRP) despite the global commitment to a legally binding agreement to phase out fossil fuels and limit global warming. This case study research is based on the geographical region of Lephhalale and involved the participation of members from six faith communities that were interviewed. The interviews revealed that communities are still not fully consulted and included in remedial development public processes. The interviewees consist of participants who identify with the Zion Christian Church, the Dutch Reformed Church, the Apostolic denomination, African indigenous traditional cultures, traditional healers and mainline Christians. The selection of participants for our interviews was based on their geographical proximity to the mines and coal fields with a particular focus on community activists already involved in NGO work, volunteers interested in the topic who were identified during our communications with groups prior to the fieldwork, and representatives of faith-based organisations. These communities will be elaborated on in section 8.

#### 4 Methodology

The overall design of this research is a qualitative case study based on the partaking faith communities' experiences in Lephhalale, using an intersectional conceptual framing and cultural mapping as a methodology. Intersectional analysis is characterised by an analytical shift away from the dichotomous, binary thinking about power that is common (Symington 2004: 3). The value-laden and normative concept of development is not traditionally analysed through its intersection with religion and human rights. Often frameworks conceptualise one person's rights as coming at the expense of another (*ibid.*: 4). In contrast, for this study we try to think about development from the perspective of intersectionality, which allows the focus on Lephhalale as a specific context, and the intersection with religion as the distinct experiences of faith communities who were interviewed, and the overarching qualitative aspects of equality, discrimination, and justice, permitting this study to address multiple issues.

The study engaged with different faith communities living in Lephhalale and its surrounding villages (see Annexe 1). Researchers applied cultural mapping as a methodological tool to guide participants in mapping sacred sites, green spaces, and water sources (used for rituals) as a starting point for identifying sites that are of religious/cultural significance. An introductory research meeting was held in Marapong on the first day of the fieldwork and was attended by 45 people from six faith communities. Research-initiated individual interviews were conducted with participants selected from the community meeting. A series of cultural inquiry workshops was planned using mapping, surveys, and individual interviews that were held during our one-week fieldwork trip conducted in March 2020. The cultural mapping workshop consisted of three groups of seven participants each. The groups were divided according to three coal development topics: water, land, and grave removals; faith/religion; and natural resources. This consisted of participants from each group mapping on poster charts the

various assets from their community, guided by the topic of their group. Thereafter, groups presented their learnings and had discussions with the other groups about the struggles and opportunities.

The aim of the cultural mapping workshops was to assist the community in identifying cultural assets and collectively decide on appropriate care and governance of the assets. Participants from the African traditional religions reflected on grave matters and the rituals surrounding the graves. Participants acknowledged that there were processes toward redress, for instance the Eskom-initiated Medupi Heritage Impact Assessment (HIA) (Mbofho Consulting and Projects 2015); however, one participant reflected, ‘The consequence of our inability to perform cultural, faith and other practices makes us go on with our lives being unfulfilled.’ Participants from Vangpan also expressed that due to land ownership struggles, some families were moved to a small part of the land with limited access to water and no electricity, making it near impossible to sustain their cultural beliefs.

During March 2020, the South African president announced the National Covid-19 Preparedness and Response Plan, which placed the country on level 5 lockdown involving restrictions on movement and travel. This decision had a huge impact on our planned fieldwork, which consisted of more engagements with local and traditional authorities that acted in the capacity as custodians of local cultural and natural assets. As a result, the lockdown shifted our study to adopt more detailed desk research between March and July 2020. The participants of this study had not previously been brought together in a mapping workshop with the intention of sharing challenges using a religion-aware lens and to identify opportunities in realising FoRB on the ground and to strengthen local stakeholder relationships. From this perspective, ‘cultural mapping is regarded as a systematic tool to involve communities in the identification and recording of local cultural assets, with the implication that this knowledge will then be used to inform collective strategies, planning processes, or other initiatives’ (Duxbury, Garrett-Petts and MacLennan 2015: 1). Nancy Duxbury, W.F. Garrett-Petts and David MacLennan define ‘cultural mapping as a mode of inquiry and a methodological tool in urban planning, cultural sustainability, and community development that makes visible the ways local stories, practices, relationships, memories, and rituals constitute places as meaningful locations’ (*ibid.*). The authors identify self-reflection and sharing as central to the ethos of cultural mapping in indigenous communities, ‘for the impulse here is both political and pedagogical’ (*ibid.*).

The action element of this research is the ongoing resistance by the Lephhalale communities in the fight against fossil fuels and various legal submissions from the Earthlife Africa coal campaign on new proposed developments. The group Concerned Citizens of Lephhalale, with whom we consulted, is part of the coal campaign and is actively campaigning in the area by monitoring Environmental Impact Assessment (EIA) processes and lobbying for legal rights education workshops to be part of public education.

The Amazon Conservation Team’s *Methodology of Collaborative Cultural Mapping* manual argues that ‘when a community is able to systematically articulate and represent its knowledge of its lands, it gains the necessary tools to establish laws, manage productive systems, implement protection methodologies and improve its quality of life’ (2008: 4).

These assets are:

both tangible, or quantitative (e.g. physical spaces, cultural organizations, public forms of promotion and self-representation, public art, cultural industries, natural and cultural heritage, architecture, people, artefacts, and other material resources) and intangible, or qualitative (e.g. values and norms, beliefs and philosophies, language, community narratives, histories and memories, relationships, rituals, traditions, identities, and shared sense of place).

(Duxbury *et al.* 2015: 1)

Previous case study research in the area of community-based research<sup>11</sup> shows that cultural assets help define communities (and help communities define themselves) in terms of cultural identity, vitality, sense of place, and quality of life (*ibid.*).

In this study, cultural inquiry informed our participatory action research approach, which relied on qualitative data analysis consisting of research-initiated individual interviews and cultural mapping workshops. Cultural mapping's participatory dimension has heightened its attractiveness as a community engagement methodology.

Through open informal conversations, themes and issues were raised by residents, which further informed the research design and outline. The central issues included access to land, the removal of graves, and access to water, which will be discussed in section 5. This helped to gain an understanding of what the community was experiencing, and which sites the researchers should visit. The site visits were based on referrals from our community guide and activist, Elana Greyling, resident and member of the Concerned Citizens of Lephalale group. She is also a member of various community-based organisations. The sites were informed by their proximity to the coal mines and power stations, water sources identified as 'sacred natural sites', and the gravesite where some Medupi graves were relocated to. At the time of writing, we had entered the first Covid-19 national lockdown, which restricted mobility and travel. This abruptly stopped additional planned fieldwork and the short documentary video to accompany this chapter. Based on the footage and visuals recorded during this fieldtrip, a short film will be released as part of this case study research in the near future. In this regard, Covid-19 had a significant impact on data collection, and desktop research helped to close the gap where more stories/narratives were originally intended to be included. Additionally, researchers reviewed secondary sources – including academic research, media reports, and relevant South African laws and policies – to corroborate some of the information provided by community members.

The sites included Marapong, Shongoane village, Steenbokpan, Vangpan, Mohlasedi village, Mahlakung Informal Settlement and Elandsbosch Farm (see Annexe 1). Researchers interviewed over 50 participants during the fieldwork trip. Participants comprised women, youth, and community leaders. We also engaged faith leaders from the Dutch Reformed Church, the Zion Christian Church, and an African traditional healer, and interviewed municipal figures such as Councillor Agnes Basson, who is the ward



Participatory mapping workshop held at Marapong.  
Photographer: The Dollie House. © IDS.

councillor of Lephalale, and Chief Seleka in Mohlasedi village. Follow-up visits to the communities will be done once the pandemic has eased.

### 5 Challenges: mining and FoRB

The current debates and literature about coal mining in South Africa focus on the economic and environmental impacts of mining. There has not been any research which adopts an intersectional lens that explores how the coal-mining industry and its related developments may impact FoRB. This section documents the relationship between faith communities' experiences and understandings of 'land', and how these shape people's notions of belonging, memory, and sense of identity.

Based on the data collected during the fieldwork, the main challenges to FoRB raised by the participants in this study were: (1) access to land, (2) the removal of graves, and (3) access to water. Sections 5.1 and 5.2 introduce the context of the laws that perpetuate the apartheid geography and which displace indigenous vulnerable faith communities in South Africa. Section 5.3 maps faith on the ground and its connection to natural resources and section 5.4 reviews the issue of grave removal.

#### 5.1 Apartheid dispossession and contemporary dispossession

The advancement of British colonialism, which was formalised by the establishment of the colony of Natal in 1843, imposed the dispossession of land, new forms of taxation, and radically disrupted the indigenous African patterns and rhythms of political, social, and religious life (Guy 1979; Keegan 1996). South Africa's history reflects the dispossession of land through a series of colonial and apartheid laws that intended to deepen segregation as Africans became alienated from the land of their birth by settlers and colonial administrations. The first serious discussions and analyses of capital accumulation and the conditions for the expansion



Aerial view of Lephale Town with the Matimba and Medupi power stations in the background.

Photographer: © ICUC Productions.

and reproduction of capitalist accumulation emerged during the late 1800s with the release of Karl Marx's *The Communist Manifesto* and later, *Das Capital*. David Harvey's theory of 'Accumulation by Dispossession' is widely accepted as a critical extension of Marx's writings on 'primitive accumulation' (Harvey 2003). Harvey defines neoliberalist capitalist policies that result in a centralisation of wealth and power in the hands of a few by dispossessing the public of their wealth or land. He describes,

the privatization of what used to be public services into profit-making enterprises: water, education, health care, and in Eastern Europe the selling off of entire national economies, the use of the international credit system (especially the IMF [International Monetary Fund]/ World Bank) as a means of forcibly transferring wealth from the Global South to the economies of the North, and the use of intellectual property rights to commodify what was once knowledge held in common (for instance, terminator seeds).

(Harvey quoted in Bailey 2014)

Harvey includes the displacement of peasants from their land, and places an emphasis on the theft and transfer of value from one class to another:

Displacement of peasant populations and the formation of a landless proletariat has accelerated in countries such as Mexico and India in the last three decades, many formerly common property resources, such as water, have been privatized (often at World Bank insistence) and brought within the capitalist logic of accumulation, alternative... forms of production and consumption have been suppressed. Nationalized industries have been privatized. Family farming has been taken over by agribusiness. And slavery has not disappeared (particularly in the sex trade).

(2003: 149)

Many scholars have framed dispossession in South Africa in terms of the amount of land lost and the numbers of families affected; however, not much attention has been given to coal-induced dispossession in Limpopo province in post-apartheid South Africa or to its religious or spiritual implications.

In her work on the relocation of the Ogies community<sup>12</sup> (from white agricultural land) to Phola township,<sup>13</sup> Dineo Skosana explains that:

it illustrates that dispossession is not only historically rooted, it is also a perpetual post-apartheid experience in African communities; that it has underlying layers of loss; and that it not only encompasses the loss of material things such as land and property, but also include[s] the loss of intangible possessions, such as the connection with ancestors, identity, memory and belonging.  
(2019b: 3)

The economic rationality that informs coal mining only acknowledges physical things, which are moveable and therefore subject to economic transaction. It fails to acknowledge people's lived experiences and undermines their expression of or access to FoRB. Furthermore,

to rethink dispossession also means to acknowledge, as Cock (2018) maintains in her recent book about the history of Kowie River in the Eastern Cape, that history and memory are tied to the landscape and the environment. The connection of landscape and history helps to show that dispossession is also the loss of attachment and belonging.  
(Cock, quoted in Skosana 2019b: 3)

During an interview with residents of Mahlakung settlement,<sup>14</sup> one resident explained how her faith practices have 'adapted' due to being dispossessed:

*Our need and right to practise our religions and faith practices is hampered in this settlement and beyond. For instance, because we do not have water ponds, streams, and facilities of running water in this settlement, rituals that are required to be performed at home or baptism and other cleansing ceremonies in line with our beliefs, are not taking place. We are then forced to go out of this settlement (our homes) and travel to other areas, sometimes far away, in Lephalale for our religious needs to be fulfilled. It becomes expensive and difficult for us. The consequence of our inability to perform cultural, faith, and other practices makes us to go on with lives unfulfilled.*  
(Anna Molekwa, Mahlakung Informal Settlement, 5 March 2020)

Anna's reflection brought to light the intersection between class, race, power, and religion. For instance, she further explained that one needs money to perform religious practices. On the other hand, Chidester argues, 'building a home was essentially a religious project, a project centred in the production of ritual space for sacrifice, healing, protection from evil, and ongoing spiritual relations with ancestors, the linkages between rural and

urban have inevitably been negotiated in religious terms' (2012: 25). Many interviews from the Mahlukung settlement highlight the lack of access to land, and by extension the idea of how stability and belonging affect people's sense of direction, as though they are unable to know or contemplate where they are going. This has many other sociocultural impacts, and yet, people living in Mahlukung remain hopeful, relying on their faith<sup>15</sup> to carry them through times of crisis.

During colonialism and apartheid, land dispossession was geared towards the destabilisation and eradication of an African agricultural economy, to force Africans into the cash-based economy and wage labour in mining and other, white-controlled industries. In the new political context, dispossession has had similar objectives: 'The relocation of the families who lived on white agricultural farmland (rural) to the township (urban) compels communities to shift from land-based modes of living to the township-based monetarised economy' (Skosana 2019b: 4). By contrast, in the post-apartheid context, it is evident that land dispossession has deeper spiritual implications and as a result, 'new indigenous religious meanings are being produced, a migrating sacred moving between rural and urban realities and a hybrid sacred situated in urban townships, that have recast the religious significance of urban space' (Chidester 2012: 25). As argued by Cock (2018), the loss of memory and skills contributes to the loss of culture and ways of being or belonging.

## 5.2 Mining-induced dispossession

The coal industry provides 90 per cent of South Africa's electricity (Minerals Council South Africa 2019: 16). Coal is the third ranked source of employment in mining after gold and platinum group metals. In 2018, at least 86,919 people with total annual earnings of R24.7bn were employed by the coal mining industry (Minerals Council South Africa 2019). Coal mining-induced dispossession, as in the apartheid period, is geared towards a market-driven mining economy, as well as state-led capitalism (Skosana 2019a).

During an interview with a resident of the Vanganpan community (Lephalale), the effects of the mines and forced removals were captured, as he recounted his experience of being removed from his original place of residence and work. His family was displaced and settled on the outskirts to make way for the new Boikarabelo coal mine owned by Research Generation (ResGen) South Africa:

*I grew up on this farm and established my family here. All my children were born here, and they do not know any other place they can call home. This changed after the death of the farm owner and the farm [was] left to his sons. As time passed, tensions arose, we then began to experience a forced removal which left us perplexed. As we were still trying to find the sense of it all, Boikarabelo Mine came into the picture as the new landowners. From that point our lives changed for the worst. We are now confined to this small portion of land without water, decent sanitation facilities, and any means to sustain our livelihood. We further do not have electricity or any means of clean energy sources. We are somewhat stateless as the municipality also cannot come in to provide us access to*

*basic services because the land belongs to a private entity. We are struggling and [the] worst is that we have no security of tenure. Each day we are becoming apprehensive about our future.*  
(Ntate Sebina, resident, Vangpan community, 4 March 2020)

It is difficult to think about land without addressing the history of segregation or economic racialised zoning as they extend the politics of race and class in South Africa. During our fieldwork and the ongoing Earthlife Africa's coal campaign, community consent, or lack thereof, and communities' exclusion from decision-making processes pertaining to developments, specifically mineral extraction legislation, is seen as the most urgent problem in mining-affected communities. As more and more information about non-compliance and disregard of existing environmental legislation is unveiled, Earthlife Africa encourages communities to consider legal action against environmental injustices as an important element of their struggles. In 2017, Earthlife Africa and SAFCEI successfully challenged a government decision to permit the construction of a proposed coal-fired power station, arguing that the proper climate change impact assessment had not been carried out. This resulted in South Africa's first climate change court case (Centre for Environmental Rights 2017).

### 5.3 Faith on the ground

This section introduces the major faiths in Lephalale, and describes the main practices relating to natural resources, as well as how those are impacted by mining developments.

*There is a fair blend of various religious orientations. The majority practise Christian religion and there are those that practise traditional indigenous belief systems. Those that practise Christian faith have organised themselves in various denominations ranging from African indigenous churches (Zion Christian Church, Apostolic Confessing Churches) and mainline churches (Charismatic orientation of churches). Traditional healers or practitioners originate from African traditional indigenous systems of belief [and] involve the rigorous training and involve the guidance from ancestral beings. These different practitioners of faith orientations coexist harmoniously.*  
(Chief Seleka in Mohlasedi village)

Religion is important in South Africa. According to a 2010 Pew Forum on Religion and Public Life study, 74 per cent of South Africans regard religion as a very important aspect of their lives. Owing to the deep African religious heritage, and the country's post-apartheid governmental campaign 'united in diversity' by the African National Congress, to manage religious diversity in the national interest, South Africa can be seen as a country that embraces all the major world religions (Lugo *et al.* 2010: 5–6). 'At the same time, many South Africans draw their understanding of the world, ethical principles, and human values from sources independent of religious institutions' (Chidester 2012: 7). The focus of this section is not to define religious communities traditionally, but to advocate,

religion as an open set of resources and strategies for negotiating a human identity, which is poised between the more than human and the less than human, in the struggles to work out the terms and conditions for living in a human place oriented in sacred space and sacred time.

(Chidester 2012: 3)

This approach has informed the use of cultural inquiry as a methodological tool. The aim was ‘to make visible the ways local stories, practices, relationships, memories, and rituals constitute places as meaningful locations’ (Duxbury *et al.* 2015: 1).

During the participatory mapping workshops, water sources in the town were mapped and connected with practices performed by various faiths and traditions. On the theme of water, one participant shared:

*Access to flowing water from the rivers and fountains has been disturbed by diversion made during the construction of power stations. A sacred fountain that is found in Bahula Mountain has been fenced off and as such those that require making use of the fountain water for the practice of faith and observing of rituals are disempowered and denied the right to practise their beliefs holistically.*

(James Moloantoa, participatory mapping workshop, 5 March 2020)

These practices include baptisms by Christian congregants, cleansing, and healing by African traditional healers. Furthermore, water is a critical element to offer as a sacrifice to the ancestors. Other participants also expressed that, as land became more privatised, access to natural ‘shrubs’ was more challenging and required people to travel far from home to access available herbs.

The participants then discussed environmental challenges at these sites and noted the changes, recognising the progressive destruction of the natural environment owing to pollution from industry, climate change, and the drying-up of water sources in the town. On the theme of religion and natural resources, one participant mapped the Mogol River and its uses, stating:

*The flowing of Mogol River was facilitating the growth of shrubs and herbs that we utilised as medicine to heal ailments our communities suffer; now as a result the land is deliberately dried up and such is no longer happening. Finally, the drying of Mogol River has now hampered the cleansing and baptism ceremonies that are prescribed as sacred and essential to practitioners of African indigenous churches.*

(Dora Letsita, Ithuteng Women’s Group, 5 March 2020)

Many participants from the different faith groups indicated that nature was God’s creation and they used ‘shrubs’ to brew traditional medicines that could heal different ailments. Further, on the theme of pollution and climate change, one 27-year-old participant reflected:

*My future as a young person is threatened by the perpetual environmental damage that is currently being pursued by coal-powered stations. The pollution of water and air becomes our generation course of daily struggle. This we must take action to ensure sustainable environment has to be achieved for our sake and future generations to come.*

(Plantina Mosima, participatory mapping workshop, 5 March 2020)

Next, the participants mapped green spots to represent sites where medicine for traditional healing can be harvested. Mogol River and Lephalele River were both mapped as central water sources in the region. Participants discussed how communities in the past relied on small-scale subsistence farming as a source of their livelihoods and compared it to the land reserved for growing food now. They further linked this to food insecurity and highlighted the need for equitable access to land for communities to grow food.

Participants also mapped places of worship including gravesites that represent sacred places and discussed access to these sites. Some of the graves are located within the Medupi Power Station campus and access is gained through requests and appointments that are granted sometimes, and the presence of armed security personnel creates a hostile environment. Moreover, the use of participatory mapping created a conversational entry point for the communities to identify hindrances or obstacles to faith practices based on their own experience and local knowledge.

The use of water and appreciation for nature expressed in these workshops showed the importance of the natural environment to the various faith traditions and their connection with a higher power.

#### 5.4 The removal of graves

The SAHRC (2016, 2008) has reported that grave relocations are one of the most sensitive and potentially contentious issues arising from the relocation process in mining-affected communities. The moving of graves by mining corporations has taken place in many socially and economically marginalised communities, resulting in further investigation through a National Hearing by the SAHRC. The findings show a callous disregard for the spiritual and cultural beliefs of affected communities by the Department of Mineral Resources and Energy (DMRE) under the Mineral and Petroleum Resources Development Act (MPRDA) and mining companies in this regard, undermining any opportunity to integrate local knowledge and the recognition or opportunity of FoRB.

During the research-initiated interviews for this chapter, an African traditional healer from Marapong expressed his concerns about the role of coal mining and how related developments affected his community:

*My greatest concern, worry and pain is the behaviour of industries that have come to work around here. Take into consideration that these industries and companies enter into agreements with the municipality on variety of issues affecting our lives. These companies once they are granted permission to operate within this area tend to undermine the cultural and traditional way of life*

*of us local communities. The case in point is the process of graves relocation carried out by Medupi power generation facility. Due to some unfathomable reason in those years, these companies did not properly consult the relatives of those [whose] graves were to be dug up and relocated. Some are still unresolved. The worst misdeed was to not involve the traditional practitioners of faith to guide the process.*

(Lazarus Seodisa, traditional healer and resident, Marapong, 3 March 2020)

Earthlife Africa and SAFCEI recognises that the issue of the graves is still a sensitive matter among the community and affected families in Lephalale, and we acknowledge that the interviews reveal subjective reflections, based on these narratives. We were mindful that the purpose of our interviews was not to investigate the accuracy of personal accounts, but to listen to stories of family members who described a deeper element of spiritual insecurity that still informs the legacy of coal-mining development today.

Furthermore, *Boom and Bust in the Waterberg* (Hallowes and Munnik 2018) revealed that Exxaro's reburial policy included covering all the costs associated with the exhumation and reburial of the graves and the relocation of the graves' dressings. But what they would not do, is pay compensation for emotional distress for the removal of the graves. Such compensation had been paid by other developers, the consultants noted, but there was no basis in the South African National Heritage Resources Act No. 25 of 1999 (NHRA), which is in place to regulate what constitutes heritage, what is to be protected, and how (*ibid.*).

While scholars recognise that grave relocations are a common phenomenon in contemporary South Africa, Dineo Skosana (2017: 1) examines the limitations of this Act, and the democratic government's need to adhere to progressive international legislative standards while its external legal influence has its basis in Christian values. She argues that the legislation does not sufficiently provide for intangible heritage and indigenous beliefs. This, in turn, permits the disturbance of graves from land with contested ownership rights and undermines the cultural rights of the previously disadvantaged communities which are endorsed by the Constitution of the Republic of South Africa, 1996 (2017: 1–2).

In 2015, Eskom commissioned a HIA by a task team (Medupi Graves Task Team), which was a response to reports filed by communities on the disturbance and desecration of graves located in the construction zone of Medupi Power Station. 'Using heritage management tools, the research tried to mediate a positive relationship between Eskom and the local people' (Mbofho Consulting and Projects 2015: 10). The report outlines that 'heritage experts had not been involved in a parallel public participation programme conducted within the ambit of the EIA, but if heritage resources were to be discovered, during the development phase, a heritage expert would be called in and appropriate mitigation measures would be taken' (*ibid.*).

The recommendations of the HIA report disclose that 'sustainable management of both disturbed and undisturbed graves as sacred heritage is proposed as part of a future Heritage Management Plan... Drawing

on the professional judgement of experts, financial compensation alone cannot adequately deal with emotional issues and belief system[s]. It may be considered alongside a package of other measures including good communication, education and healing programmes for trauma... Local communities must be allowed to organise rituals at the graves and proposed shrine. Reasonable access should be granted to the graves and the proposed shrine' (*ibid.*: 21–23).

Finally, the report underlines that it is necessary to establish an independent monitoring mechanism for the implementation of recommendations and to organise long-term future protection of heritage resources (*ibid.*: 23–24).

In 2017, The High-Level Panel on the Assessment of Key Legislation and the Acceleration of Fundamental Change, chaired by former President Kgalema Motlanthe, published its report on key themes, of which social cohesion and nation-building were priorities. The report analyses the trajectory of South Africa's development, at the heart of the post-apartheid project of building an inclusive society. It provides comprehensive analysis of the rural and urban land questions, rural governance, and the different dimensions of the land reform programme. It also addresses poverty, spatial inequality, and mining-induced dispossession. A review of the key findings and recommendations include addressing the legacy of mining and accountability of communities and mining companies (LARC 2018). The report recommends that:

- The most urgent task in the current context is to provide meaningful protection to vulnerable groups faced with external mining or other investment deals that will negatively impact on their land rights. Such rights holders must be properly consulted, and their consent obtained for others to use the land they occupy and use. If they withhold their consent, the investment company must be required to apply to court for the expropriation of their rights, and the court must then balance the interests of the rights holders with those of the investment company within the parameters of Section 25 of the Constitution. The Interim Protection of Informal Land Rights Act No. 31 of 1996 should be amended to make this explicit (*ibid.*: 2).
- The MPRDA must be amended to ensure that both revenues from mining-related activities and opportunities generated by such mining activity are shared in an equitable and transparent manner among people whose land rights are directly affected (*ibid.*: 3).

Despite these efforts and amendments in the legislation, mining rights and licences continue to be granted in protected areas. At present, the government is planning to develop a R145bn<sup>16</sup> Chinese-controlled energy and metallurgical industrial complex at the Musina-Makhado Special Economic Zone, which is situated in an area of cultural and heritage significance (Sole 2020). Since governments around the world began rolling back on basic rights and freedoms in order to flatten the Covid-19 curve, Kevin Bloom wrote that,

whatever was happening at the hyper-local level of the EMSEZ project, its ultimate driving forces were the international economic system and closed-door, top-tier geopolitics. Whether or not the ordinary citizens of South Africa would be able to prevail against these forces depended on a circumstance that nobody could have foreseen, being the outbreak of a global pandemic and its implications for the powers of the nation-state.

(Bloom 2020)

Despite prior evidence, the SAHRC strongly cautions against prioritising the immediate economic benefit of mining activities over the maintenance and protection of the environment, particularly in those areas that are crucial for sustaining ecological biodiversity, natural heritage, cultural significance, and life (2016: 25). Furthermore, the SAHRC is particularly concerned by the DMRE's inability to provide information about the monitoring of mining activities in protected areas. The issue of the graves is still a sensitive matter among the community of Lephalale, as reflected by the voices of the participants:

*My own son is buried in Medupi Power Station Complex as we speak and the most painful part is that I do not have the right of access to his grave to perform the necessary rituals that are of critical necessity as required by my traditional practice.*

(Dora Letsita, Ithuteng Women's Group, 5 March 2020)

*What are we going to do in case of our ancestors, like a grandfather visits me and request appeasement of some kind? How am I going to accede to his demands because his grave is inaccessible to me? Being a community that has its foundations on African spiritual paradigms, consultations and appeasement of our departed ancestors is paramount. This is the result of the poor execution of the earlier proposals around removal of graves made to our traditional leaders that resulted with others being able to remove their graves in time whilst others were unjustly denied such opportunity.*

(Member of Ithuteng Women's Group, 5 March 2020)

From these reflections, which describe the sacredness of graves from an African traditional religious perspective, it is understood that a grave is a site of connection between the living and the dead. Beliefs around it are intangible, however, and access to some graves (Medupi precinct and privately owned land) in Lephalale is still a contentious matter for communities.

In summary, the disregard for African traditional religious systems in the process of removing graves promotes conditions for the commercialisation of the sacred, in that all parties involved throughout the development process benefit and profit from that which causes communities to suffer. In the next section, we explore a vision that integrates economy and ecology, towards a more religion-aware development agenda.

## 6 Opportunities for integrating FoRB

### 6.1 Religion, development, and the Just Transition

This section looks at the opportunities to integrate FoRB in development and the Just Transition,<sup>17</sup> by exploring the potential for more ‘religion-aware’ or inclusive development. Additionally, the learnings and findings from our case study recognise how faith or faith communities can strengthen social and economic capital. Thus, we refer to the national Just Transition, identified by the global labour movement as an emerging platform and tool that informs future development in the country.

At this critical moment, as the world attempts to transition to a more just and sustainable economy, South Africa must recognise FoRB as a human right on a par with other rights. In this light, religion is understood as a system of knowledge, practice, and human agency that can make a meaningful contribution to the emergence of a global citizens’ movement. One key recommendation towards that path is to build counter-power (Cock 2019) through multiple entry points. When looking at strategies that support more meaningful participation of faith communities in decision-making processes, this idea is useful to this analysis.

Building counter-power as an entry to integrating FoRB in development can involve ‘using different types of power: structural, associational, social and institutional to disrupt the dominant social order’ (Schmalz *et al.* 2019). Environmental justice organisations, such as Earthlife Africa, in partnership with community-based movements in Limpopo (Waterberg District), already draw on different forms of power; for example, public meetings and demonstrations, marches, and social media, which target institutional powers to make policy interventions. Cock explains ‘judicial activism is using institutional power as a source of agency, appealing to human rights, labour laws and procedures such as environmental impact assessments and the constitutional rights to a safe and healthy environment’ (2019: 7). As the founding members of the Life After Coal Campaign, Earthlife Africa in partnership with the Centre for Environmental Rights and groundWork, draw on judicial power for climate change litigation.

Another opportunity is provided for, at legislative and policymaking levels, by engaging with multilateral actors. Throughout this case study, researchers engaged with the Portfolio Committee on Cooperative Governance and Traditional Affairs (COGTA), and as a result, the committee scheduled their annual programme of engagements and interactions with the religious sector, on matters of national importance, through the South African Religious Forum (SARF). SARF is recognised at the policymaking level and acts as the representative body of all religious and faith bodies in South Africa. COGTA offers a unique platform to galvanise the opinions and views of the religious sector in matters of socioeconomic development of society, and these engagements are anticipated to be replicated at provincial and local government levels. Once this model is replicated at the local level, it is anticipated that the views of faith communities will be considered in all societal development processes. There is great opportunity to promote FoRB-sensitive education which targets the various stakeholders in municipal and community-based organisations, and the urgent need for more education on FoRB can be met by delivering workshops in local communities.

In the context of promoting FoRB as part of a broader agenda, ‘those engaged in peacebuilding work on the ground have often used interfaith dialogues as the entry point for consensus building around a new social contract’ (Tadros 2020: 3). ‘CREID has placed inclusive community development practices as central to its approach to addressing intersecting inequalities while using other entry points, like monitoring and countering hate speech’ (*ibid.*). For this case study, researchers used communities’ heritage and sacred natural sites under threat as an entry point for the promotion of FoRB in development projects, specifically the continuing coal-mining development in Lephalale, and therein lies an opportunity to integrate FoRB into facilitation processes by considering the cultural and religious associations and significance of places. While the EIA and SEA (which is the parent policy that informs HIA) can be identified as entry points to access institutional or judicial transformation for communities, there are still shortcomings of relying solely on this form of power. As observed through the Medupi HIA report (Mbofho Consulting and Projects 2015), heritage management is still an emerging field of practice, particularly in South Africa.

In *Resistance to Coal and the Possibilities of a Just Transition in South Africa*, Cock explains that ‘new grassroots organisations are drawing on associational power – meaning organizing to increase numbers, build social networks, formal or informal alliances and a collective identity through an emphasis on shared everyday experiences’ (2019: 7). But generating counter-power involves connecting different struggles. Herein lies an opportunity for FoRB to be utilised as a unique entry point to building counter-power in the Just Transition in South Africa.

## 6.2 The Olive Agenda as a process towards promoting FoRB

In Southern Africa, SAFCEI has a long-standing reputation of working with multi-faith leaders and religious actors to promote the values of what can be understood as Green Religion<sup>18</sup> movement building. We point to Steve de Gruchy’s Olive Agenda (2017), which proposes a ‘metaphorical theology of development’ that can be used as a strategy to further FoRB on the ground. The Olive Agenda provides a theory which inspires possibilities to facilitate more religion-aware development and illustrates how theology might serve democracy and public life. De Gruchy proposes a theological engagement with a metaphor that could transcend the duality between the ‘green’ environmental agenda and the ‘brown’ poverty agenda that has disabled development for the past 20 years:

The mix of green and brown suggests an olive agenda; which in turn provides a remarkably rich metaphor – the olive – that holds together that which religious and political discourse rends apart: earth, land, climate, labour, time, family, food, nutrition, health, hunger, poverty, power and violence.  
(*ibid.*: 1)

De Gruchy’s choice of the olive as a metaphor is deliberate, in that it is not an either/or (green or brown agenda) but both, and it is through the blending of the two that he brings the need for an Olive Agenda to the

foreground. When considering such a metaphorical theology, what might this mean for the context of faith communities in Lephhalale?

Civil society has argued that there is currently no blueprint for the Just Transition away from fossil fuel capitalism.

*Economic developments in our area should have managed other needs (faith, culture, and tradition) more effectively. The development that we witnessed with the construction of Medupi Power Station should have provided safe spaces for all to benefit from. It should ensure that those who wish to utilise nature and all that it offers are able to benefit whilst at the same time it satisfies those who stated employment was high on their list of needs. The undisputable fact remains that we look forward to creation of employment opportunities but on a more holistic, sustainable manner. There were mistakes in the way the development of Medupi was carried out. Needs analysis of the communities surrounding the enterprise was not done hence today various components of this society are frustrated.*

(James Moloantla, activist and community representative from Mohlasedi, 5 March 2020)

When researchers held cultural mapping workshops during the fieldwork of this study, issues of faith that were not previously recognised through development participatory engagements were brought to the foreground, as well as their intersection with environmental challenges. Interviewees expressed that the cultural issues were not raised but rather an emphasis on the economic benefits and jobs that these developments would bring to communities. The value of applying the Olive Agenda also allows for the recognition of the role of women in social and economic production at household and community levels through paid and unpaid work such as care and domestic work.

The principles of the Olive Agenda find application through a multitude of means that consider social, ecological, and economic production. Within the context of Lephhalale's faith communities, any development process needs to promote holistic facilitation processes that deliberately account for both 'green' and 'brown' concerns.

This manifests as social factors, such as poverty, FoRB, and cultural production, carrying equal footing and importance as environmental sustainability, as well as local and national economic imperatives like job creation; in doing so, narrowing the 'chasm' which divides economy and ecology (de Gruchy 2007: 1).

De Gruchy (2007: 5) notes that to realise the Olive Agenda development, Africa cannot replicate the ecologically and socially exploitative model for development undertaken by the Global North and the Industrial Revolution which has birthed our modern global economy (*ibid.*: 2). The Olive Agenda might then look to localisation as a means to socially and economically uplift communities in the long term, as such, driving a greater appreciation for the contribution that individuals and communities make to sustaining ecologies while uplifting and contributing to a sustainable economy.

Restructuring the local, national, and global economy to emphasise the localisation of production within communities addresses the 'brown agenda', which centres on the elimination of poverty through sustainable employment, and creates a model for ecologically sustainable systems and processes that fall 'within the borders of nature's regeneration' (*ibid.*: 2). Simultaneously, this would address the 'green agenda' through a reduction in fossil fuel reliance, greenhouse gas production, soil erosion, pollution, and deforestation.

### 6.3 Reconciliation of spiritual insecurity and stakeholder engagement

*Part of the explanation as to why there is resistance is based on the false notions by some community members who hold a view that our involvement as faith practitioners is a way of denying prospects of job opportunities and livelihoods. There should be a process of reconciliation between the companies that work around here with the communities. The reconciliation I am talking about must enable a new path of engaging each other on a platform of mutual respect of each culture, faith, and religious beliefs. Mutual understanding of both the community and the companies working here will provide an opportunity for sustainable development and prosperity for people in in Lephhalale and beyond (Waterberg District as a whole). The understanding I am talking about will give the communities new direction to the path of prosperous life. (Lazarus Seodisa, traditional healer, Marapong, 3 March 2020)*

During an interview with Reverend Daan van Wyk of the Dutch Reformed Church, he acknowledged that there is a notable social divide in Lephhalale. However, he further expressed solidarity with other communities and a willingness to venture out of the bounds of his Afrikaans-speaking community to explore opportunities for FoRB as a faith leader.

Religious agency provides a lens through which we can better understand how communities and individuals claim and practise religious or spiritual identities, and FoRB opportunely fits within the discourse of development, as it refers to a range of articulations of agency that encompasses both intangible and tangible dimensions like practice and teaching, etc. (Tadros 2020: 9), but also embodies other human rights freedoms.

Although separating religious agency from the broader political agenda of governments presents a challenge, the potential for FoRB to contribute to local and foreign policy is marked, and when considered as part of an inclusive and holistic development agenda, can bridge gaps between divided communities by proposing alternative frameworks and pathways for community building and discourse in a way that includes women and youth representation and addresses 'on-the-ground' power dynamics within and across groups (*ibid.*).

We have already acknowledged SAFCEI's work with multi-faith leaders and religious actors in Southern Africa to promote the values of Green Religion movement building. However, insufficient recognition and support are assumed to the potential of religion, including its frameworks, tools, and strategies to participate in the Just Transition narrative; and how

religion can open new pathways to guide policy and the integration of FoRB on the ground needs to be given more consideration.

The resilience and agency of women in the communities visited by the researchers, including other mining-affected communities in South Africa, is displayed through their active participation in socially, culturally, and economically productive activities despite the challenges of ‘everyday life’. These challenges – for example, insufficient access to basic services such as water and sanitation, as well as exclusion and lack of access to basic human rights – are the most prevalent in these marginalised contexts where people are still actively striving for a democratic, just, and community-focused world. These characteristics must be acknowledged by taking into account their specific perspectives and concerns during facilitation processes, noting their multiple roles in sustainable development, and implementing economic and social policies that specifically aid and uplift women, as well as increase their economic participation.

During an interview in Marapong with Francina Nkosi, resident of Shongoane and local human rights defender, she shared her hope for future developments in Lephalale, that ‘land be made available for farming’, as a gateway to poverty reduction by uplifting women’s participation in agriculture, as well as reducing food and intergenerational nutrition security. Nkosi further described how ‘land is sacred in African traditions; therefore, it not only nourishes us with food, indigenous seeds and livelihoods, it is through the land that we are able to dream and connect with our African spiritualities’. She also said that as women play critical roles in sustaining cultural production and traditions, ensuring that they have adequate resources, such as land, water and food, to do so is paramount. From this reflection, it is possible to assert that access to land is a crucial element to realising FoRB in Lephalale. Other women that we engaged with from the Ithuteng Women’s Group continue to save indigenous seed as an act of resistance, and farm on a small scale. The communities’ seed-saving preserves and counteracts the over-extraction of natural resources, and the resultant ecological degradation by preserving biodiversity and promoting sustainable use of natural resources. It also preserves traditional seeds which form part of cultures and contribute to ensuring food security.

Finally, in a 2018 case of Xolobeni, the High Court ruled in favour of a community during a mining rights case.<sup>19</sup> This could disrupt the current precedent and empower communities on communal land with the right to reject new mining projects. These perspectives, within the context of religion and development, illustrate that alternative models and possibilities for better, nuanced, and sustainable development do exist.

## **7 Concluding summary**

This research enquiry was guided by the central research question: ‘what are the struggles and opportunities for integrating freedom of religion or belief into development or humanitarian programmes?’. The action element of this research continues as it forms part of the ongoing resistance by the Lephalale communities in their fight against the extraction of fossil fuels, and various legal submissions from Earthlife Africa’s coal campaign on new proposed developments to the area. The group Concerned Citizens of Lephalale, with whom we consulted, and which is part of the Earthlife

coal campaign, actively campaign in the area by monitoring EIA processes and lobbying for legal rights education workshops to be part of public education.

In this chapter, we reviewed the background and historical context of coal mining in South Africa, then examined the challenges of mining within the context of FoRB, and lastly, explored some of the opportunities for integrating FoRB into development, with reference to the national Just Transition. Owing to the new pathways mapped by this research, Earthlife Africa and SAFCEI are positive that more similar thinking will be held in public spaces and meetings as the community becomes increasingly aware of their rights in this regard. From the interviews and reflections shared by participants, it is evident that education around FoRB is needed. Currently, there is a strong, existing, environmental advocacy movement on the ground, to which much attention is paid. However, as observed by the researchers regarding the removal of graves (see section 5.4), this aspect is still very sensitive as people were not well informed on their rights regarding FoRB, nor were they familiar with the NHRA, which is in place to protect the cultural and religious rights of people in South Africa. In summary, we recognise that people mobilise around the rights which they know they have. Finally, based on the footage and visuals recorded during this field trip, a short film, forming part of the case study research, will be released in the near future.

## Annexe 1

The sites include:

### Marapong

A settlement established with the exploration and first excavations of coal mines to provide residence to workers of both the mines and Matimba Power Station, largely from villages far from the mines. This settlement provided accommodation even for workers from neighbouring countries such as Botswana and is concentrated with African communities of various social standing. The older part of it has modern housing and 'extensions', which are characterised by shacks (informal housing). In terms of religion, there is cocktail of orientations: a large concentration of mainline Christians followed by those who belong to indigenous African churches, such as the Zion Christian Church and Apostolic Church. Practitioners of African indigenous cultures also exist in smaller numbers. The first language of the residents is Sepedi and the population is over 90 per cent black African. The research team interacted with nine members of the community of Marapong. Participants in this group comprised youth, men, women, and community-based organisations.

### Shongoane village

One of the largest villages in Lephalale, under the traditional chieftaincy of Shongoane. It is claimed that large parts of the former Ellisras Town formerly belonged to Shongoane. The first language of the residents is Sepedi and a smaller percentage speak Setswana; the area is 90 per cent black African. A visit to Shongoane for the purpose of this research was not undertaken; however, members of the community were engaged with by the research team through workshops during the fieldwork. The research team interacted with nine members. Participants in this group comprised youth, men, and women.

### Steenbokpan

A farming area owned by a consortium of farmers. Some farms have been sold recently to coal-mining enterprises, thus changing the mode of production from an agricultural hub into coal mining. The majority identifies with Christianity with blends of African traditional belief systems in place. Residents interviewed for this research had been allocated a piece of land for residential purposes. One resident gave an impression that this community observes multiple religious practices.

*In this area and community, we have a fair blend of various faith practices and orientations being practised around. The situation has always been like that ever since the establishment of this settlement and relations are generally harmonious and cordial.*

(Letta, 4 March 2020, Steenbokpan)

The research team met one member of this community, a community leader and a presiding elder in the Apostolic Church.

#### Vangpan

For many generations this was a white-owned farm holding. However, the enticement that comes with the expansion of the coal development mines saw this farm being sold some years ago to Resource Generation (ResGen) South Africa, which intends to transform the agricultural farm from food production into a mining hub for coal to supply the growing needs of both Medupi and Matimba power stations. The main spoken languages are Afrikaans and Sepedi. Few black families remain on the land because their deceased elders are buried on the farm and they remain destitute, without security of tenure and other rights that ordinary South Africans are granted in the country's constitution. Speaking on behalf of the families still remaining in the area, Mr Sebina spoke about the living conditions on the farm:

*The set-up we are in now makes it difficult for us to gather as we used to in the days before Boikarabelo and forced removals. We used to have multi-denominational services to celebrate common religious and significant days as a united body of Christ Church. The services used to involve members of Apostolic, Zion and mainline churches. We still yearn for those days where we were able to pray together but as you can see the current situation is not conducive for that, others have also left this farm.*

(Mr Sebina, 4 March 2020, Vangpan)

The research team interacted with seven members of the community. Participants in this group comprised youth, men, and women.

#### Mohlasedi village

Named after its traditional founder Mohlasedi who originally hails from Botswana, several generations have settled in this far northern part of Ellisras Town. The first language of the participants is Sepedi and 90 per cent of the community is black African. It is a religious community of various blends of Christian orientations, with pockets of those practising traditional spirituality. Confirming this background, Chief Seleka mentioned:

*There is a fair blend of various religious orientations. The majority practise Christian religion and also there are still those that practise traditional belief systems. Those that practise Christian faith have organised themselves in various denominations ranging from African indigenous and those defined as mainline churches. All those different practitioners of various faith orientations coexist harmoniously.*

(Chief Seleka, Mohlasedi village, 4 March 2020)

The research team interacted with 11 members of the community. Participants in this group comprised youth, men, and women, and the Ithuteng Women's Group.

#### Mahlakung Informal Settlement

The settlement is built on Eskom-owned land and came into existence because of employment opportunities from the construction of the Medupi Power Station, in particular. It is a poorly serviced settlement with one communal tap and non-existent ablution facilities. Due to its overpopulation, residents indicate their difficulty in practising their faith. A resident of the community reflected on FoRB:

*Our need and right to practise our religions and faith practices is hampered in this settlement and beyond. For instance, we do not have water ponds or streams that are required to perform baptism and other cleansing ceremonies that are necessary in line of our faith practices. We are then forced to get out of this settlement and travel to other areas of Lephalale for our religious needs to be fulfilled.*

(Anna Molekwa, Mahlakung Informal Settlement, 5 March 2020)

During the observation of Easter and other religious holidays, people often migrate back to their homelands. The research team interacted with eight participants from the settlement, comprising a majority of women.

#### Elandsbosch Farm

A private farm holding owned by a few white families who maintain farming of crops and hold game animals as their key activity. We received a tour of the farm and in our interviews, they discussed their resistance to the expansion of coal mines and energy generation plants in the area. We also recorded visuals on their farm to show the range and scope, and to assist different understandings of land redistribution in the country. The landowner of Elandsbosch Farm (Hardus Steenkamp, a Christian farmer) has resisted temptations to transform their agricultural lands into mining hubs, based on the understanding that care for the natural environment must be maintained for the generations to come.

## Notes

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- 1 Rifqah Tifloen, Operations Manager, Earthlife Africa, South Africa.
  - 2 Matome Jacky Makgoba, Southern African Faith Communities' Environment Institute, South Africa.
  - 3 National Environmental Management Act (umbrella Act) (NEMA); Mineral and Petroleum Resources Development Act (MPRDA); National Environmental Management: Protected Areas Act (NEMPAA); Strategic Environmental Assessment (SEA); Environmental Impact Assessment (EIA); Heritage Impact Assessment (HIA).
  - 4 Earthlife Africa is an environmental justice, anti-nuclear non-profit organisation, founded in Johannesburg, South Africa in 1988. It espouses the idea that the most marginalised in society suffer the worst impacts of environmental destruction caused by industrialisation, destructive lifestyles and practices, and the irresponsible growth paradigm. Since its inception, Earthlife Africa has aimed to create a platform that supports economically and socially excluded communities to participate in environmental decision-making processes so that their quality of life is protected. Earthlife Africa's work assists and supports the participation of individuals, businesses, and industries to reduce pollution, minimise waste, and protect our natural resources. For further information, see **Earthlife Africa website**.
  - 5 The Southern African Faith Communities' Environment Institute (SAFCEI) is a multi-faith organisation committed to supporting faith leaders and their communities in Southern Africa to increase awareness, understanding, and action on eco-justice, sustainable living, and climate change. It was launched in 2005 after a multi-faith environment conference which called for the establishment of a faith-based environment initiative. SAFCEI emphasises the spiritual and moral imperative to care for the Earth and the community of all life. It calls for ethical leadership from all those in power and speaks out

- on issues of eco-justice, encouraging citizen action. For further information, see **SAFCEI website**.
- 6 See **Earthlife Africa's coal campaign webpage**.
  - 7 For example, gravesites and accompanying rituals performed at the sites by African traditional religious communities.
  - 8 Land, water, and indigenous plants for medicine.
  - 9 See the UN's **Paris Agreement webpage**.
  - 10 The title of a **book by James Charlton** (California Scholarship Online, 2012).
  - 11 As per **Creative City Network of Canada website**; also Clark, Sutherland and Young (1995); Martin (2002); UNESCO (n.d.); Young (2003).
  - 12 Ogies community (Tweefontein) is in Mpumalanga province.
  - 13 Phola is a township 8km from Ogies.
  - 14 Mahlakung Informal Settlement was established to provide accommodation for the growing number of people who flock to Lephalale because of the opportunities that Medupi Power Station and coal mines provide. The land is owned by Eskom and it only has one communal tap with no permanent structures, aside from the hundreds of homes constructed from corrugated iron and wood pallet materials.
  - 15 Here faith is used broadly, within the specific context of the place, to express belief in a higher power, spirit, and multi-faith perspective. This is owed to a mix of Christian and multiple indigenous beliefs expressed by participants from different cultures living in Mahlakung.
  - 16 The quoted price-tag at the time of the Musina-Makhado Special Economic Zone's launch was R40bn, and has now ballooned to R145bn (Bloom 2020).
  - 17 The 'Just Transition' concept, advocated by trade unions, is a response to the UNFCCC Paris Agreement. Just Transition strategies should be understood as a package of policies and actions aimed at anticipating the impacts of climate policies on employment, protecting and even improving workers' livelihoods (health, skills, rights) and supporting their communities (Rosemberg 2017: 149).
  - 18 Green Religion posits that environmentally friendly behaviour is a religious obligation (Taylor 2010: 10).
  - 19 In November 2018 the Gauteng High Court, Pretoria, ruled that consent must be given by communities living on ancestral land before government can give the go ahead for mining rights (see Venter 2018).

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## Chapter 7

# **The Integration of Traditional Religious Beliefs in the Conservation of the Rwenzori Mountains National Park, Uganda: Processes, and Lessons Learned\*\*†**

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### **1 Background**

National parks in rural Africa are said to face various problems such as encroachment (by human settlement and agriculture) and loss of biodiversity as a result of illegal access and indiscriminate extraction of resources therein by the neighbouring community (Brockington 2002). Attempts by biodiversity conservationists, especially the national park staff, to address the problems have been ineffective and have resulted in poor relations with the local people living in nearby villages. Conflicts regarding overuse of national park resources are common in many national parks in Africa (Secretariat of the Convention on Biological Diversity 2010). To address these poor relationships and conflicts in national parks, a plethora of studies, especially from anthropologists and social scientists, have argued for the integration of local people's interests into the management of national parks (Igoe 2002).

One of the available options to consider local people's interests in the management of national parks is a traditional religious belief system comprising beliefs, knowledge, and practices. However, studies that advocate for this consideration have mainly been theoretical, relying on and drawing from historical accounts of lifestyles of people in traditional societies but lacking practical demonstrations and interventions.

In Uganda, attempts were made beginning in 2008 to integrate local people's traditional religious beliefs, knowledge, and practices in the Rwenzori Mountains National Park under the Culture, Values and Conservation Project (CVCP) implemented jointly by the Uganda Wildlife Authority and Fauna and Flora International. This was a short-term project aimed at demonstrating how the integration of beliefs, knowledge, and practices in park management could achieve better relations between the local people and the park staff. It was assumed that improved relations could translate into reduced incidents of illegal access and resource use. The lifespan of the project ended in 2012 but left several spin-off activities on conservation and the traditional religious beliefs of the local

communities which were taken over by the Universal Institute of Research and Innovations in 2014.

Resulting from the call for expressions of interest as part of the Coalition for Religious Equality and Inclusive Development (CREID), a case study based on the CVCP and the spin-off activities has been presented in this chapter. The intention of CREID is to provide research evidence and deliver practical programmes which aim to redress the impact of discrimination on the grounds of religion or belief, tackle poverty and exclusion, and promote people's wellbeing and empowerment. Based on this intention, in this case study, we aim to answer the following questions:

- 1 What are the traditional religious beliefs, their meaning and manifestation among the local communities in the Rwenzori Mountains?
- 2 Why were the traditional religious beliefs of the communities in and around the Rwenzori Mountains neglected and not integrated at inception during the creation of the national park?
- 3 How were the traditional religious beliefs integrated into the conservation and management of the park?
- 4 What were the successes and failures of the project in the integration of religious beliefs?
- 5 What are the key lessons of the project worth noting, and what lessons can be utilised for the African rural context or where similar situations prevail?

This case study is exciting in part because it is based on the Rwenzori Mountains which, by their location along the equator, and with the heat of the sun, surprisingly have glaciers. However, glaciers are already being affected by global warming and the local people are affected by the impacts associated with climate change. Based on their traditional religious beliefs, the local people had devised a way of mitigating the impacts. However, the creation of the national park has hindered people's expression of these beliefs, and it has affected the perception of the mountains and its conservation. This case study has a strong appeal in that it addresses the recognition of the importance of religious beliefs in relation to conservation and addressing climate change. This is not only a local and national issue but also a global challenge.

## **2 Overview of the body of literature underpinning the case study**

It has been extensively documented that the conservation of national parks must be supported by local communities neighbouring those parks if such efforts are to succeed (Abrams *et al.* 2009). In cases where local people support parks, there is success and in cases where they do not support parks, there is failure (Muhumuza and Balkwill 2013). Various studies have been conducted in search of what motivates local people to support biodiversity conservation. Most of these studies link local people's support of conservation to benefits that they obtain from parks (Malleon 2000; Kasperek 2008). This means that people who do not benefit from the conservation of biodiversity in national parks are less likely to support the conservation of biodiversity in those parks. Usually, they regard them as anathema to their welfare.

## 2.1 Extrinsic motivation for local people's conservation practices

Integrated conservation and development projects in and around national parks are planned and implemented based on the assumption that if local people derive economic benefits from parks, they will support the conservation of biodiversity in parks (Kasperek 2008). For instance, 'tourism revenue-sharing' schemes and alternative livelihood projects that are often implemented in communities near national parks aim at ensuring that local people benefit from the establishment of national parks and hence support biodiversity conservation in those parks.

Studies that have evaluated community-based conservation projects implemented in communities near national parks have found that it is not automatic that people will be motivated to conserve biodiversity in national parks even if they are given incentives in compensation for their limited access to the park (Malleon 2000). In some cases, even when benefits that people receive as compensation for limited access to park resources change people's attitude towards the park (Holmern *et al.* 2002), the attitude may not lead to a change of behaviour towards pro-conservation practices. In the Rwenzori Mountains, for instance, despite the implementation of various strategies to motivate people to support the conservation of the Rwenzori Mountains National Park, local people still obtained resources in the park and conducted activities that were considered illegal by the park management (Tumusiime, Vedeld and Gombya-Ssembajjwe 2011). This calls for further exploration of the factors underlying illegal access to the national park for resources.

Some of these factors, such as the need for resources for survival and livelihood (including commercial trade) and claiming ownership of the protected area and the resources therein, are more obvious because they emanate from within the external environment of the individual. These are commonly targeted in interventions that attempt to address illegal access to resources and in facilitating sustainable utilisation (Neumann 1998).

## 2.2 The role of traditional religious beliefs in conservation

Apart from the extrinsic factors that motivate conservation practices, there are, however, other subtle factors emanating from an individual's mindset, intrinsic norms, and values of the community in which the individual lives that may also influence illegal access to resources of protected areas. Resource use among traditional communities in rural Africa is, for instance, influenced by traditional religious beliefs that are subtle in nature and lie in the individual's mindset but which may only be expressed occasionally through religious rituals (Christie 1991).

Analysis of the literature on traditional or indigenous approaches to biodiversity conservation (described in Agrawal 1995) revealed a variety of traditional approaches that may have been used in the sustainable utilisation of natural resources in the past. This study concludes that based on these approaches, the protection of biodiversity and habitats could have been coincidentally achieved through a religious belief system comprising customary rules, traditional beliefs, and traditional practices established through experiential indigenous knowledge.

Traditional cultures of people in rural Africa are said to have developed based on the environmental resources and resource availability which

shape the evolution of traditional religious practices (*ibid.*). Given the limited success of current community-based conservation strategies, case studies on how traditional religious beliefs and practices influence resource use and management is very important. From such case studies, scholars could draw useful lessons to enhance their understanding of the reasons for local people's continued illegal access to park resources which could serve as a basis for proposing sustainable ways of utilising the resources.

**2.3 Attempts to integrate traditional religious beliefs in conservation**  
The view that indigenous people in traditional communities deliberately sustained biodiversity, and therefore the traditional religious beliefs and the associated methods they used should be integrated into current conservation approaches, has been regarded as a contentious issue in the contemporary literature. There is substantial literature about whether or not people in African traditional communities conserved biodiversity based on their traditional religious beliefs (for instance, Cinner 2007; Cohn 1988; Saj, Mather and Sicotte 2006). The available literature provides contrasting points of view about traditional biodiversity conservation, suggesting that people in traditional communities did not have the motive and restraint over resource use to qualify as conservationists (Alvard 1993, 1994; Winterhalder *et al.* 1988).

Publications about 'the ecologically noble savage' (Hames 2007; Posey 1985) provide important debates about the pros and cons of recognising and attempting to integrate traditional religious beliefs in modern conservation strategies. These debates have triggered a need to have more evidence to provide a basis for the recognition and inclusion of these strategies in current biodiversity conservation schemes (Beltrán 2000; Brook and McLachlan 2008; Byarugaba 2010).

Scientific evidence generated through practical case studies is needed due to the close association of traditional biodiversity conservation strategies to folklore which, according to science, is not empirical but merely based on religious beliefs. Folklore is defined as oral history, jokes, legends, taboos, music, proverbs, customs, and popular beliefs that are the traditions of a given culture and which have been passed from one generation to another through casual imitation or oral transmission (Medin and Atran 1999). Folklore constitutes a lot of information gathered through lived experiences with the natural world (Saikia 2008). Traditional communities hold in folklore, perceptions and ideas regarding plant and animal species (*ibid.*). Folklore could offer important sources of information that are part of a religious belief system that could potentially solve a number of problems associated with the conservation of biodiversity.

Although there are various subtypes of folklore that can be distinguished into traditional religious beliefs, knowledge, and practices (Ceriaco *et al.* 2011), most studies on the role of folklore in biodiversity conservation have mainly investigated traditional ecological knowledge (Berkes 2008; Byarugaba 2010; Cohn 1988; Ramstad *et al.* 2007; Saj *et al.* 2006). Detailed descriptive studies about traditional beliefs, knowledge, and practices and how they are linked to biodiversity conservation are few and their wider application in biodiversity conservation remains elusive. This, therefore, necessitates a need for a reference case study.

Previous and current conservation strategies (Campbell 2000) indicate that conservationists have shown no interest in studies that attempt to demonstrate the relationship between traditional religious beliefs, and biodiversity conservation (Ceríaco *et al.* 2011). In part, this is due to continued inertia in favour of scientific practices that follow the scientific method of inquiry and the need to describe traditional religious beliefs in scientific terms. The epistemology of traditional religious beliefs is constructed on non-scientific grounds and hence conservationists think that this limits their applicability in conservation science (Byarugaba 2010). The non-scientific basis of traditional religious beliefs makes it difficult to assess their role in biodiversity conservation. Also, the difficulty of accessing information about traditional religious beliefs because it is rarely written down (Huntington 2000) has limited its integration into current biodiversity conservation strategies. Also, social and cultural changes in African communities as they adopt modern lifestyles, and conversion to popular religious practices make it difficult to locate traditional religious beliefs linked to biodiversity conservation which could serve as practical examples.

The emphasis of formal scientific studies as a basis of creating, expanding, and developing modern protected areas has resulted in the disregard of traditional aspects of biodiversity conservation. Local people's traditional religious beliefs are not even considered in the process of proposing and implementing various conservation strategies, even when these conservation decisions directly affect their livelihood, survival, and expression of these beliefs (Darkoh 2009). For example, in the International Union for Conservation of Nature best practice guidelines on indigenous and traditional peoples and protected areas, Wild and McLeod (2008) found that in ten out of 11 case studies, local communities had not been consulted before the creation of the protected areas. The low level of consultation with local communities indicates an exclusionary biodiversity conservation strategy whereby local people have been regarded as detrimental to conservation and in many cases (Muhumuza and Balkwill 2013) removed from protected areas at significant economic and social cost.

Despite the difficulty associated with recognising and integrating traditional religious beliefs in biodiversity conservation, they are known to influence resource use and management in rural African communities where they are upheld (Berkes, Colding and Folke 2000). The study of traditional religious beliefs, therefore, becomes of considerable interest to conservation scientists, especially when made from local people's perspective (Davis and Wagner 2003). For instance, local people in Indian communities expressed traditional religious beliefs about ecological aspects of their environment when investigated from a traditional and cultural perspective, rather than from a formal schooling and education perspective (Bhagwat and Rutte 2006).

Such examples have in the last 30 years (beginning in early 1980) influenced the evolution of discourses in biodiversity conservation strategies that hinge on more local people-inclusive strategies such as integrated conservation and development, and community education programmes. However, these strategies have also neither entirely succeeded in interesting local people to support biodiversity conservation in protected areas nor

have they led to a reduction in biodiversity loss in and outside protected areas (Campbell 2000). With these strategies failing, there is a demand for other ways of involving the local people in the conservation of national parks to be sought. There is an urgent need to devise other strategies or improve the existing ones so as to create interest and build support among the local community to support conservation objectives associated with national parks. Therefore, the role of local people's traditional religious beliefs in conservation remains an open area for study and documentation.

#### 2.4 Key considerations in the study and documentation of synergies between traditional knowledge and science

During the last decades, we have seen that more non-indigenous scholars are working with indigenous people and local communities (IPLC), and embracing collaborative and participative research approaches. Scientists from different disciplines are engaged with policymakers and IPLC to face complex environmental issues. However, these processes are not without challenges. Difficulties in reconciling worldviews, goals, methodologies, and rigid funding and research schemes ended up encapsulating fragments of indigenous and local knowledge (ILK) in Western paradigms (Muller 2012). Within this scope, it occurred that scientists and practitioners using their positional superiority, in the name of modernity and development, usurped and co-opted ILK (Smith 2012; Briggs 2013).

A decolonising turn is emerging to counteract the effects of the Western paradigm, not only concerning ILK but also with other knowledge systems. This is a new way of doing science that first recognises the past and present dominant ontologies but is also capable of imagining the future without its dominance. It is a new paradigm of situated knowledge that embraces complexity, uncertainty, conflict, power dynamics, and divergence (Porter 2010) that promotes the revitalisation of ILK, placing different knowledge systems at the same level (Tapia 2016), and building up a pluriverse of knowledge (Grosfoguel 2012). In particular, the pluralistic nature of community-based biodiversity conservation that involves science, politics, cultural beliefs, economics, and behavioural responses requires a multifaceted knowledge source. However, we see that in planning theories and practice, indigenous people and local communities have been voiceless and excluded. Both theory and practice have been failing in the reconciliation of ontological and epistemological differences between indigenous and non-indigenous forms of understanding the land (Barry and Porter 2012). This situation has been true in the Ugandan context of planning national park management since the early 1950s when the first national park was created.

Another essential aspect is the notion of knowledge and its relationship with reality. In contrast to Western paradigms, where abstract knowledge is very important to represent reality, according to the rationale of the Bamba and Bakonjo peoples, the reality lies within the present, it is experiential, and could be (re)created in a symbolic and ceremonial (re)presentation of it. The symbol is a sacred presentation of reality. The best way to understand this reality is not the concept(s) expressed with words, but rather the reality itself, which is alive in constant motion with the whole universe. Knowledge is a collective subconscious transmitted from one generation to another

orally and by actions (know-how), through narratives, stories, rituals, cults, and customs. This know-how is not the result of an intellectual effort but the result of an empirical activity that can manifest in interdisciplinary approaches in pursuit of sustainable development projects, as elaborated in section 2.5.

### 2.5 Sustainability and transdisciplinarity in development projects

Although many efforts have been made throughout project management in development projects, some constraints still exist: (1) the lack of significant degree of self-reflection on its own impacts; (2) the lack of complementarity of these efforts; (3) the fragmented approach by each individual effort; (4) the lack of effective cooperation among stakeholders and; (5) a lack of cultural and societal contextualisation. In order to ensure the sustainability of these sustainable development efforts in the future, a transdisciplinary approach is needed.

The tackling of these issues themselves, however, also influences specifically the social and cultural characteristics of communities (Abelshausen 2016). These sustainable development efforts are therefore somehow failing their intended goals and need to be better contextualised to the specificities of local communities and their social and cultural organisation and traditions (i.e. transdisciplinarity). Every culture with its own practices has particular capacities and hence faces different conditions; consequently, sustainability is multi-dimensional historically, culturally, and geographically (Bonnett 1999). Not surprisingly, sustainability should be contextualised in order to adapt the concept to the national and regional unique contexts.

The usefulness of transdisciplinarity, which is an approach that includes multiple scientific disciplines focusing on shared problems and the active input of practitioners from outside academia, has long been recognised (Craps 2019). Transdisciplinarity involves producing, integrating, and managing knowledge from across disciplines (Scholz *et al.* 2006; Klein 2001, 2004). Transdisciplinarity indicates a realistic way of building sustainable futures in which reality as ontology is presumed to comprise multiple levels of reality (Nicolescu 2012; McGregor 2012). Transdisciplinarity as a mode of community-based learning involves novice, lay people, and experts jointly addressing issues of shared concern. Learning for sustainability takes on forms such as problem- and project-based learning (Wiek *et al.* 2014) and entails the integration of other (non-academic) forms of knowledge in the learning process (e.g. traditional ecological knowledge (Reid and Sieber 2020)). The variety of knowledge forms and educational practices linked to transdisciplinary learning for sustainability are framed within the scholarship on community-based learning and assets-based learning. Conceptualisation of this learning is, however, most often framed within disciplinary bounds such as educational sciences (Nicolescu and Ertas 2013) or within social capital theory (Putnam 2000).

### 2.6 Community capitals and community development

Based on the literature (Apgar, Argumedo and Allen 2009; Mumuni, Alhassan and Sulemana 2019; Klein 2010; Lang *et al.* 2012; Bergmann *et al.* 2013), it is hypothesised that the implementation of system-level and assets-based community development can lead to transdisciplinarity.

The Community Capitals Framework (CCF) (Flora, Flora and Fey 2004) is a system-level, assets-based approach framed within the broader field of community development (Gutiérrez-Montes, Emery and Fernandez-Baca 2009; Kretzmann and McKnight 1996) and social capital theory (*cf.* bridging, bonding, linking (Putnam 2000)). Community development has a tradition of applying needs-driven approaches even though research and practice have provided evidence for the benefits of asset-based community development (Kretzmann and McKnight 1996; Burkett 2011). Of these two divergent options, argument has long been made for the latter, i.e. assets-based community development (ABCD) (Kretzmann and McKnight 1996). Within the framework of ABCD, Flora *et al.* (2004) developed the CCF. The CCF is an approach that envisions economic security, a healthy ecosystem, and social equity (Gutiérrez-Montes *et al.* 2009; Flora *et al.* 2004). The CCF approach builds upon the strengths, traditions, and societal organisations that are already present in a community rather than focusing on what is missing, i.e. what is needed.

Flora *et al.* (2004) developed the CCF to allow for these assets to be identified within community development projects. This framework contains seven capitals; natural, cultural, human, social, political, built, and financial. CCF for this reason places itself within a community, transcending academia and having the potential for transdisciplinarity in sustainable development projects. The CCF has the potential to embed sustainability efforts within communities, provide ownership to communities, and thereby achieve sustainability. It was hypothesised by Gutiérrez-Montes *et al.* (2009) that by augmenting the system-level ABCD CCF approach with local participation and decision-making, long-term sustainability of development efforts can be ensured.

The framework for analysis is the CCF as designed by Flora *et al.* (2004). The analysis criteria follow the descriptions of the seven community capitals: natural, cultural, human, social, political, built, and financial. Simplified, the community capitals entail:

Natural Capital – The environment, natural beauty, lakes, rivers and streams, forests, wildlife, soil, the local landscape.

Cultural Capital – Ethnicity, generations, stories and traditions, spirituality, habits, and heritage.

Human Capital – All the skills and abilities of people, leadership, knowledge, and the ability to access resources.

Social Capital – Groups, organisations, networks in the community, the sense of belonging, bonds between people.

Political Capital – Connections to people in power, access to resources, leverage, and influence to achieve goals.

Built Capital – Buildings and infrastructure – schools, roads, water and sewer systems, and main streets – in a community.

Financial Capital – Money, charitable giving, grants, access to funding, and wealth.

(Jacobs 2011: 1)

The interaction of all seven capitals theoretically brings about a spiralling effect (Emery and Flora 2006). Within this theory, Gutiérrez-Montes *et al.*

(2009) found that an ongoing process of assets building on assets can lead to the effect of an upward spiral. The theory of cumulative causation states that the place that loses assets, for whatever reason, will continue to lose them through system effect. Emery and Flora (2006), however, theorise that the opposite is also true: that an increase in assets will attract other assets. Their research also shows that the capitals that initiate a spiralling period are highly influential on the upwards or downwards trajectory of the spiral (*ibid.*). They indicate that the social capital is the possible predominant capital needed for spiralling up (*ibid.*).

The potential of the CCF for transdisciplinarity could be the subject of further research in order to assess the community capitals in relation to prevalent discourses from environmental sciences (*cf.* environmental management, nature conservation, protected area management (Cooke and Lane 2019; Nkhata and Breen 2010)). The change in assets identified from our focus group discussions and interviews can already be used for the development of guidelines for community-based conservation that harnesses the value of traditional religious beliefs and practices.

Specifically, we can investigate how the CCF can act as a bridge to close/ remedy the gap between community development and sustainability. This implies the examination of the CCF within the current sustainability discourse, moving beyond project-driven sustainability (Burns 2015).

Finally, the CCF has the potential to act as a transdisciplinary approach that adheres to the scholarship of transcending academia, while at the same time providing a rigorous methodology that has the potential to transcend disciplines within the academia (Kirby 2019).

### **3 The Rwenzori Mountains National Park case study**

#### **3.1 Description of the study area**

The Rwenzori Mountains National Park lies on the border between Uganda and the Democratic Republic of Congo on the east side of the Western Rift Valley in East Africa (Figure 7.1). It is located between 0°06' and 0°46' North and 29°47' and 30°11' East, between the neighbouring lakes Albert and Edward within the Albertine Rift (Howard 1991). The Rwenzori Mountains include the third, fourth, and fifth highest mountain peaks on the African continent (*ibid.*). The Rwenzori Mountains National Park traverses four districts (Kasese, Bunyangabu, Kabarole, and Bundibugyo) that form part of the nine districts which collectively constitute what is politically known as the Rwenzori region in mid-Western Uganda.

The Rwenzori Mountains National Park is of great conservation importance for three main reasons. Firstly, it has a rich and unique biodiversity as it is home to a variety of plant and animal species, many of which are endemic, rare, or globally threatened. Its uniqueness is attributed to species richness, a number of endemics, and a range of habitats (*ibid.*; Wilson 1995). In the afro-alpine zone, 81 per cent of the 278 woody plant taxa are endemic to the East African region (Hedberg 1961; Lush 1993). The Rwenzori Mountains National Park has at least 177 species of forest birds which constitute 17.6 per cent of the total forest birds in the country, including 19 birds which are found only in the Albertine Rift (Wilson 1995).

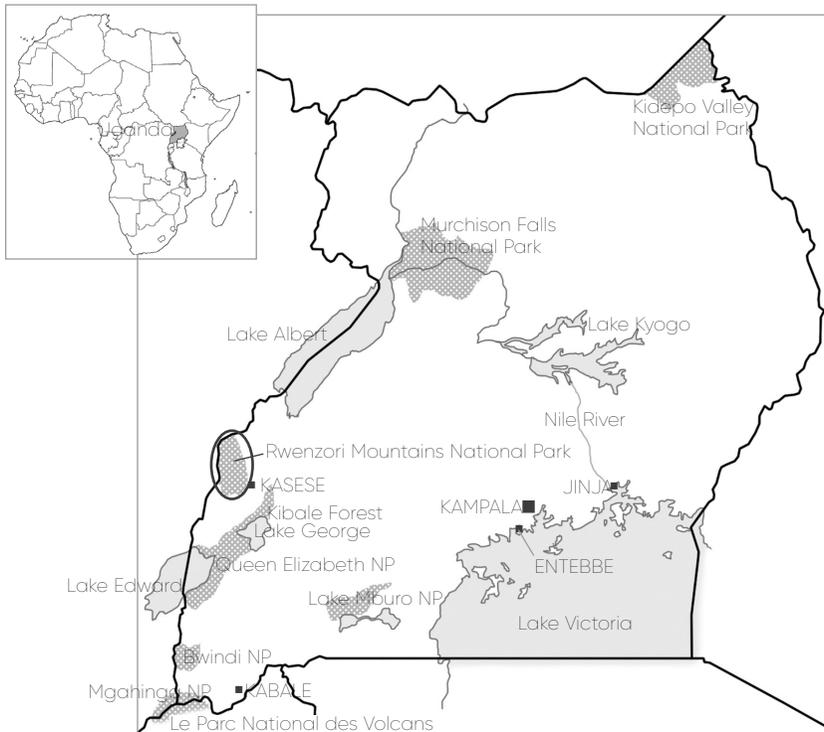
In the Rwenzori Mountains National Park, there are also 15 species of butterfly which constitute 22 per cent of butterflies in the country

(Howard 1991). A survey carried out in 1948 found 60 species of invertebrate and 25 of them had previously not been known (Salt 1987). Secondly, it is a fragile ecosystem prone to biological and physical degradation, induced by both natural and human factors. To prevent such degradation requires putting in place conservation measures. Thirdly and most importantly for this case study, the Rwenzori Mountains National Park is a cultural symbol of the local people. It is inhabited mainly by the Bamba and Bakonzo people whose traditional religious practices are closely associated with the mountains (Stacey 1996). A variety of superstitions, tales, and folklore about the Rwenzori Mountains are embedded within the traditional religious belief system (*ibid.*). The traditional religious beliefs may lead to practices that may affect the harvest of natural resources in the Rwenzori Mountains.

### 3.2 The problems in the Rwenzori Mountains National Park that motivated the need for conservation

Despite conservation efforts in the Rwenzori Mountains National Park, resources continued to be illegally harvested (Loefer 1997) and the park boundary encroached (Muhumuza 2006). The effect of the illegal activities of the people on the park is evidenced by a difference in vegetation in and around the park. There was a noticeable difference in vegetation cover between the community land and the land currently protected as part of the park. There was land degradation and soil erosion in the villages

Figure 7.1 Location of the Rwenzori Mountains National Park



neighbouring the park (National Environment Management Authority 2006). There was a decrease in natural vegetation cover between 1955–99 (in each district traversed by the Rwenzori Mountains National Park) and 2001–05 in the entire Rwenzori region.

Many species formerly abundant in the mountains, such as the wild buffalo, are rare as a result of anthropogenic activities (Loefer 1997). Biodiversity loss and resource degradation attributed to local people's practices has persisted since the early 1990s up to the present.

There was a conflict of interest between the local community for the need to have access to the park resources and the Uganda Wildlife Authority for conservation and tourism activities (Nkonya *et al.* 2002). Their needs could explain why the local communities are said to still carry out illegal activities such as poaching, accessing restricted areas without permits, and the harvesting of resources.

Bids by the park administration to prevent illegal activities from occurring have met with resistance from the local people. The communities bordering the park are said to have developed negative attitudes towards the existence of the park. Such attitudes involved setting some areas of the park ablaze and killing stray animals without any intended benefit. This was also demonstrated when some of the community members were caught in the park being involved in the illegal extraction of resources, or when the park authorities enforced the by-laws (Tamale and Nzirambi 1996). Local people in the villages that neighbour the Rwenzori Mountains National Park say that they are being regarded by Uganda Wildlife Authority staff as less important than the monkeys and baboons in the park (*ibid.*). Other problems involving many natural calamities such as floods, landslides, soil erosion, and erratic seasonal changes are common phenomena in the Rwenzori region (BBC News 2010; Majangu and Basalirwa 1996; Muhumuza, Muzinduki and Hyeroba 2011; Protos-Directorate of Water Resources Management 2012; Lara, Cruz and Anderson 2013).

### 3.3 Why the problems required the integration of traditional religious beliefs

From the literature on the Rwenzori Mountains National Park, it appears that several causes could have contributed to problems associated with the conservation of the park as relating to traditional religious beliefs. When part of the Rwenzori Mountains was gazetted a forest reserve and then consequently a national park, the local people were not consulted and yet they are an important stakeholder group that traditionally owned the area (McCall 1996). It is not a guarantee that they would have simply accepted transferring ownership and management of the area to the central government. However, it was most likely that they could have expressed alternative views about access and use rights of the area and the resources therein based on their traditional religious beliefs.

Community consultations prior to the establishment of national parks have been found elsewhere to be among the factors that influence successful conservation of biodiversity in protected areas. The establishment of the Rwenzori Mountains National Park must also have thus been considered by the local people as anathema to them because it threatened their welfare, since the majority of them depended on the resources in the area where

the park was established for survival and livelihood (CVCP 2007) as well as religious practices. Additionally, the legislation governing the park was not clear to the people (Muhumuza 2006) as it did not resonate with their traditional religious perspective of the Rwenzori Mountains and the resources therein (Ministry of Natural Resources 1995).

When community involvement in conservation was eventually considered in 1996, it was not well grounded in research. The revenue generated out of tourism is very small and the 20 per cent allocated to the community cannot meet the needs of every community member, let alone be a direct substitute for the resource needs that the local people previously obtained from the park (UNESCO 2002). Local representation on the Park Management Committee (PMC) was implemented, but the representatives seem to have no popular authority among the local people. This was because the traditional leadership structure respected the traditional religious leaders but they were not represented on the committee.

The local people have continued to argue with the park administration for their failure to allow them into the park to express their traditional religious beliefs. This expression involved evoking and appeasing the spirits that the local people believed have protected them for decades (CVCP 2007). From the claims made by the local people, the CVCP deduced that attending to the traditional religious beliefs of the local people and integrating them into the management of the national park would be a step towards addressing the conservation problems facing the Rwenzori Mountains National Park.

In the following sections, we present how the information for this case study was gathered and explore how the traditional religious beliefs of the Bamba and Bakonjo in the Rwenzori Mountains were expressed. We also consider the reasons for not considering those traditional religious beliefs in the establishment of the national park; the steps, approaches, and strategies that were used in the integration of religious beliefs into the management of the park; the successes and failures of the integration of religious beliefs into the management of the park; and the testimonies from the implementing team and communities of the lessons learned.

#### **4 How the information for this case study was gathered**

This case study was prepared between February and April 2020. The information for this case study was based on three sources: (1) documents containing the CVCP implementation reports. There were four unpublished annual reports from 2008 to 2012 in the office of the Warden Community Conservation at the Rwenzori Mountains National Park; (2) the key informant interviewees who were the staff of the Uganda Wildlife Authority involved in the implementation of the project and those that foresaw the post-project activities. There were 20 respondents, five from each of the four districts traversed by the Rwenzori Mountains National Park; (3) the local communities in and around the Rwenzori Mountains National Park that were involved in the integration of traditional religious beliefs into the management of the national park. There were 40 respondents, ten from each of the four districts traversed by the Rwenzori Mountains National Park.

The CVCP implementation reports were analysed through the document analysis procedures using a protocol that captured information on the

traditional religious beliefs of the Bamba and Bakonjo in the Rwenzori Mountains, the reasons for not considering those traditional religious beliefs in the establishment of the national park, and the steps, approaches, and strategies that were used in the integration of religious beliefs into the management of the park.

The key informant interviews were conducted using an open-ended interview schedule that was administered by the researcher. An open-ended interview schedule comprises questions that do not include a set of response options (Züll 2016). Open-ended questions require respondents to formulate a response in their own words and to express it verbally or in writing. Respondents are not steered in a particular direction by predefined response categories. Such questions are particularly useful for getting the story behind a participant's experiences (McNamara 1999). The interviewer can pursue in-depth information around the topic. In this case, it was necessary to get deeper information from participants about their experiences regarding the integration of their traditional religious beliefs into the management of the park, in order to understand the processes they went through and the results that were achieved. Information from the local communities was gathered through focus group discussions using an open-ended focus group discussion guide.

This case presents a unique ethnographic encounter whereby the questions posed can only be answered through the primary data that were collected through the project. Without that data/information, the questions would remain unanswered.

The information gathered was analysed following the thematic content analysis procedures. In this process, the information was categorised under each of the case study questions as stipulated in the background to this chapter (see section 1).

## **5 Findings on the integration of traditional religious beliefs into the conservation of the Rwenzori Mountains National Park**

### **5.1 Traditional religious beliefs: their meaning and manifestation among the local communities in the Rwenzori Mountains**

#### **5.1.1 The cosmology**

Among the Rwenzori Mountain people, there are traditional religious beliefs that have an impact on the conservation of natural resources. The description of the cultural practices of the mountain people (Stacey 2008) shows a close relationship between the belief system, the mountain environment, and the plant and animal species in the mountains. For example, the Bakonzo cosmology begins with the creator (Nyamuhanga) who made the snow (Nzururu). According to oral legend, Nzururu is the father of the spirits Kithasamba and Nyabibuya, who are responsible for human life, its continuity, and its welfare.

Kithasamba, who is believed to live in the glaciated mountain peaks, is a giant force who controls the natural environment and the lives of all of the mountain people (*ibid.*). Local people in the Rwenzori Mountains attribute current erratic seasons and the loss of snow to their failure to practise their traditional religious rituals, which has angered Kithasamba. Therefore, this indicates that the local people in the Rwenzori Mountains still have a strong traditional religious belief system associated with the environment.

Also, the etymologies of many of the words in the language spoken by the inhabitants of the Rwenzori Mountains are based on the natural resources in the mountains. For example, the word 'Rwenzori' comes from a local word 'Rwenjura' meaning that the mountain is the home of rainfall ('*enjura*' in the local language). Each mountain ridge has a local name with a local meaning.

### 5.1.2 Beliefs in gods and spirits

Local people traditionally believed that gods lived in different peaks and different mountain resources. Traditionally, over 30 gods and goddesses are associated with various resources in the mountains but only 21 (Table 7.1) were mentioned by respondents because the names of other gods and goddesses were supposed to be mentioned only while performing rituals and not casually such as in an interview.

Local people traditionally believed that gods had wives, children, soldiers, and pages. Gods mentioned can be placed in three categorical groups: one group comprised nine 'white gods', the second group constituted an unspecified number of 'black gods', and the third was a miscellaneous group (including mothers to gods, children, soldiers, and pages of gods). Each of the gods had unique names concerning the power and control of that god.

There were several ways in which gods were believed to influence local people's relationships with resources and their utilisation. For instance, bark cloth (locally known as Orubugo and made from the *Ficus* species) was said to be a cloth for the gods. It was also believed that all mountain ridges and some plant species are the homes of gods. Gods brought resources from an unknown place to humankind and some gods reside inside those resources. Plant species said to be homes of gods include: *Euphorbia candelabrum*, *Euphorbia tirucalli*, *Dracaena afromontana*, and *Cymbopogon afronardus*. It was believed that the use of resources from those species and other resources in various mountain ridges must conform to the expectations of gods. People traditionally worshipped certain trees and they believed that in some situations, if such trees were cut, they would bleed or cry or speak with an expression of pain.

People with particular names associated with gods were supposed to harvest resources in a particular way. An individual with the name 'Ndahura' was supposed to collect only species of plants that have thorns and rough leaves. Such a person was the only one who could successfully hunt animals with rough and sharp fur. A person with the name 'Mulindwa' was supposed to hunt only carnivores. A Mulindwa-named person was also supposed to collect plant species of medicinal value that protect people from attack by enemies or wild animals. Such people had powers to resist attack from any wild animal (ranging from small animals such as snakes to big animals such as lions and leopards). A person with the name 'Mugenyi' was supposed to hunt herbivores. A Mugenyi-named person was also supposed to collect plant species of medicinal value that protect people from illnesses and plant species rich in amphetamines.

People who worshipped the god Mulindwa were not supposed to worship the god Mugenyi and hence each of the worshippers of one god was not supposed to gather resources that are gathered by another. The restrictions in worshipping gods did not only stop at gathering resources but also extended to social relations among the community.

**Table 7.1 Gods and goddesses that local people believed control resource use in the Rwenzori Mountains**

God and goddess	Responsibility of god or goddess
1 Nyamuhanga	The creator of everything
2 Nzururu	The god of snow and the father of gods Kithasamba and Nyabibuya
3 Kithasamba	The overall god of humans. Kithasamba is believed to live in the glaciated Rwenzori Mountain peaks. This god is described as a giant force that controls the natural environment and the lives of all the mountain people.
4 Nyabibuya	The goddess of blessings
5 Mugenyi	The god of visitors and domestic animals
6 Ndahura	The god of diseases known to cause and cure diseases
7 Kalisya	The god of hunters
8 Kahigi	The god of wild animals
9 Nyabinji	The god of abundant harvest
10 Irungu	The god and spirit of wilderness and hunters
11 Mulindwa	The god of misfortune. He was believed to make people's plans succeed or fail
12 Nyabahasa	The goddess believed to enable women to bear twins
13 Walyuba	The god of life and its perpetuity
14 Ndahukira	The god of luck and destiny
15 Mulembeki	The god of expectant mothers and children
16 Mbolhu	The god of strong love among women
17 Ndyoka	The god of water and wetlands
18 Kaleghire	The god of rescue
19 Kathulikanzira	The god of travellers, believed to guide the movement of travellers
20 Kayikara	The god of herbalists
21 Muthundi	The god of abundant harvest

Source: Authors' own.

Traditionally, people built houses or huts or shrines for gods, and in those places, they evoked them during cultural practices. Such houses were constructed using particular plant resources which had to be collected in a particular way. Hunting was conducted in close consultation with the gods. Hunters had to consult a god of wild animals ('Kalisya') before they engaged in hunting. People held a belief that the god of wild animals became furious, not only when hunting occurred without consulting him, but even when people did not engage in hunting.

*Not hunting is disrespect to Kalisya, the god of hunters and the other hunting spirits and this is a bad omen.*  
(CVCP 2007)

Engaging in hunting without first honouring the demands of the gods would be fruitless. Local people had strong beliefs about the control of gods on resource use evidenced by the statement below:

*If the spirits themselves make their call, not even the rangers will see us going up to the sites, and yet we will go through their protected area, even when they are there. I can even cut down all the trees without the rangers seeing me if the spirits are with me!*  
(CVCP 2007)

Obtaining resources in the mountains without following the proper procedure of appeasing the gods resulted in punishments from those particular gods. Common punishments included deformity of the body by developing hunchbacks, swollen limbs, atrophy in the limbs, insensibility in some parts of the body, abnormality in the number of fingers and toes (especially the development of the sixth finger and toe), the production of twins, and the occurrence of peculiar phenomena such as giving birth to albinos. These punishments occurred either immediately or later to the offender and or his or her close relatives.

Such incidents could occur not only as a result of not appeasing the gods when collecting resources but also through other causes. However, there were traditional ways to know that the cause of the problem was non-conformity to the requirements of a particular god in the harvest of resources.

These influence other traditional beliefs and practices such as beliefs in totems, beliefs in taboos, traditional knowledge, traditional rules and management, and cultural rituals which are critical for the survival of the community in and around the Rwenzori Mountains. For instance, the right of the indigenous people in the Rwenzori Mountains to follow their own religious faith is natural capital, cultural capital, human capital, social capital, political capital, built capital, and financial capital based on the categorisation by Jacobs (2011). For instance, traditionally, although they were from different ethnicities, the Bakonzo and Bamba jointly performed the circumcision ritual (RFPJ 2019). That ritual enhanced social, cultural, human, and political capitals necessary for their survival. Also, the traditional rituals and practices of the indigenous people are often exhibited in communities for tourism purposes to enhance the communities' financial capital. The totems and taboos are also known to have positive conservation implications which

enhance natural capital. Enhanced natural capital has the added advantage of reducing vulnerability to the effects of climate change.

## 5.2 Why traditional religious beliefs of the communities were neglected at inception during the creation of the national park

The first formal attempts to conserve the Rwenzori Mountains were implemented in 1941 when part of the mountain was gazetted into a forest reserve. Rules governing the exploitation of the resources within the forest reserve were as follows (McCall 1996): (a) hunting was totally prohibited; and (b) forest products (such as timber, firewood, bamboo, and honey) inside the reserve could be taken for personal domestic use without a permit or payment of fees. A senior forest officer was empowered to issue permits at his discretion to individuals to allow them to fell trees, take forest produce, reside, cultivate, or graze livestock within the reserve. At this time, the traditional religious beliefs of the local people and their association with resource use had not yet been documented.

In 1991, 996km<sup>2</sup> of the mountain was gazetted a national park, under the management of the Uganda National Parks. More stringent regulations on its use were put in place (*ibid.*). Resource harvesting and many activities were totally forbidden in the park. By this time, the traditional religious beliefs of the local people had been documented by some anthropologists. Only selected traditional rituals were permitted, provided all other regulations were adhered to (*ibid.*). However, the Uganda National Parks experienced severe problems because local people continued to engage in prohibited activities (Mutebi 2005). Attempts by the park managers to prevent these activities from taking place in the park were futile. Park staff experienced harassment and death threats from the local people. At this time, the entire scope of the local people's traditional religious beliefs and its significance in natural resources management was not known to the Uganda National Parks staff.

*The management of the park thought that the slightest involvement of the people would deplete resources in the park as the intention was to have the park off the hands of the local community.*

(Community interview 4)

In 1994, due to the ecological significance of the Rwenzori Mountains and the problems encountered in conserving biodiversity in the Rwenzori Mountains National Park, the park was declared a World Heritage Site by the United Nations Educational, Scientific and Cultural Organization (UNESCO). This elevated the conservation importance of the Rwenzori Mountains National Park to an international level. However, this elevation only considered the natural resources but neglected the cultural resources and the belief system of the local people, as their association with the natural resources in the mountains was not known.

*The government conservation policies at the time were solely focused on biodiversity and not on the conservation of local people's beliefs.*

(Key informant interview 7)

In 1996, the management of national parks and other protected areas in Uganda was shifted from the Uganda National Parks to the Uganda Wildlife Authority, a newly created body (Fumihiko 2007). Resulting from the conservation challenges encountered by the Uganda National Parks, the Uganda Wildlife Authority recommended that community-based conservation of not only the Rwenzori Mountains National Park but all national parks in Uganda should be a priority if more effective conservation was to be realised (*ibid.*).

Cognisant of the need for community-based conservation in all national parks in Uganda, the mission statement of the Uganda Wildlife Authority was, and currently is, 'to conserve and sustainably manage the wildlife and protected areas of Uganda in partnership with neighbouring communities and other stakeholders for the benefit of the people of Uganda and the global community' (Mutebi 2005: 5).

Under the community-based conservation strategy, agreements would be reached between local people and the Uganda Wildlife Authority (*ibid.*). In line with the mission of the Uganda Wildlife Authority, the Rwenzori Mountains National Park administration proposed the following (Oryema 1996):

- 1 Revenue sharing: 20 per cent of all gate collections from tourists should go to the communities neighbouring the park;
- 2 Representation of the local people on the PMC: the local community would select some of its members to represent them on the Park Management Advisory Committee;
- 3 Employment opportunities for local community members: local people would be given priority whenever there were any job vacancies;
- 4 Regulated access to the park: some members of the community, after obtaining a permit, could access restricted resources in specific areas of the park.

All these proposals have been implemented in the Rwenzori Mountains National Park since 1996 (Mutebi 2005). These proposals were made in anticipation that the local people would be motivated to support conservation and ensure the sustainable use of natural resources in the park, under the control of the Uganda Wildlife Authority. However, these provisions did not bring to the fore local people's traditional belief system and their potential role in conservation.

The reason why the traditional religious beliefs of the communities were neglected during the creation of the national park was a lack of knowledge about these traditional beliefs. The traditional way of life of the local people was considered to be largely myth which could not offer any practical solutions to the conservation of biodiversity in the park.

Also because of other religious beliefs from mainstream faiths such as Christianity and Islam, traditional religious beliefs and practices were considered demonic and evil. The attitudes from mainstream religions affected the voice and recognition of the indigenous faith in several ways. For instance, the communities in one of the Rwenzori Mountain ridges (called the Kinyampanika Ridge) that are currently predominantly Seventh-Day Adventists pointed out that their parents and grandparents

were compelled by the Christian missionaries to denounce their traditional beliefs and practices and to adopt Christian beliefs so that they can eventually benefit from the amenities offered by the missionaries such as prayer books and formal education. Threats of suffering and burning in hell were also used to scare away indigenous people from their traditional beliefs and practices. The adherents of the Christian faith also destroyed traditional shrines where indigenous people used to perform their traditional religious practices. The community shrines were replaced with mainstream religious places of worship that looked superior, hence affecting the indigenous faith.

The traditional leadership structure through which traditional religious beliefs were expressed had been largely replaced by a national political system which included local council leaders but who were not necessarily traditional leaders. The management of the national parks was based on the Yellowstone National Park model that was embedded in conservation biology, a science that was seen to be parallel to traditional religious beliefs.

The process of protecting the Rwenzori Mountains since 1941 as elaborated above suggests that the attitudes and actions of the park managers and authorities encroached on indigenous people's right to exercise their faith. For instance, among the permitted activities when the park was created and eventually when community-based conservation interventions were considered, there was not a single community activity that allowed local people to conduct traditional religious practices. Limiting access to places in the park where local people performed their religious rituals is indicative of infringement on indigenous people's rights. Their traditional faith necessitates that religious rituals are conducted in specific places and not anywhere else. Even if they were to find alternative places to perform the rituals, prohibiting access to wild animals which are used during ritual performance would mean that such religious rituals could not be conducted, hence limiting their right to religious expression.

### 5.3 How traditional religious beliefs were integrated into the conservation and management of the park

Due to a growing body of literature claiming that in most African traditional communities there were traditional biodiversity conservation strategies (Holdgate 1999), the CVCP project attempted to investigate, plan, and implement conservation approaches that integrated local people's traditional religious beliefs.

#### 5.3.1 The steps, approaches, and strategies that were used in the integration of traditional religious beliefs into the management of the park

In pursuit of a more effective biodiversity conservation strategy in the Rwenzori Mountains National Park, a cultural-based conservation strategy was proposed. In 2008, the CVCP began to be implemented by the Uganda Wildlife Authority and Fauna and Flora International. The project was intended to test the application of traditional religious beliefs and practices to the conservation of biodiversity in some national parks

in Uganda (starting with the Rwenzori Mountains National Park) and to design practical interventions to integrate local people's culture into park management. The aim was 'to strengthen the linkage between the park and their neighbouring communities by representing them through traditional religious values that are meaningful and relevant to them' (CVCP 2012: 2). The long-term goal of the project was to provide a practical demonstration of how improved relations with local communities can be achieved by incorporating locally meaningful traditional religious beliefs and practices into protected area management.

A description of the efforts undertaken in conducting consultative meetings and investigations and arriving at adaptable management proposals, experiences, and lessons learned in the process are presented in section 5.3.2.

### 5.3.2 A consultative process with the local community and other stakeholders

The consultative processes were based on an increasing appreciation that for long-term sustainable management of protected areas, the cooperation and support of local people is needed (Rodney 2000). It has been realised that biodiversity cannot be protected or sustainably used without all the stakeholders coming together and planning for the resources.

In the national parks of Uganda, local community support is often ingrained in community-based conservation strategies (Mutebi 2005). However, the actual level of local people participating in the management of national parks remains in question (Rodney 2000). The authors used six levels on the scale of participation, ranging as a continuum from greatest dependence on external agents, to greatest self-reliance.

Stakeholders in the conservation of protected areas are seen as:

Persons or groups that are aware of their interests in the protected area, who possess specific capacities such as skills, knowledge and comparative advantage for management due to their proximity or resource use mandate, and who are willing to invest time, money and political authority in becoming involved in protected areas management.

(Borrini-Feyerabend 1999: 25)

From the onset, stakeholder participation in the process of integrating traditional religious beliefs and practices in the Rwenzori Mountains was considered important. Given that the CVCP was initiated from outside the community where it was implemented, the participation of the community through self-mobilisation did not happen. However, based on prior work on local community perspectives and resource needs, the project was introduced to the community and an interactive participation process occurred. The local community was closely involved in planning, information-gathering, and decision-making on how their religious beliefs and practices could be integrated into the management plan of the park.

Within the limits of time available (a common characteristic of donor-driven projects which often have a short timespan), rapid ethnographic

assessment procedures (Davis and Wagner 2003) were used to conduct consultations with the local community. These were adopted because they enable investigations into a sociocultural context in a short time (usually in less than a month or even a week) (*ibid.*). A rapid assessment was used to analyse how religious beliefs and practices interrelate and how they could enhance biodiversity conservation in the Rwenzori Mountains National Park. Given that stakeholders were of different categories, they were approached variously using distinct methods (individual, expert, and impromptu group interviews and focus group discussions) as a characteristic element of a triangulated methodology inherent in rapid ethnographic assessment procedures.

Ten individual interviews were conducted with environmental officers, Uganda Wildlife Authority staff, and chairpersons of local organisations engaged in either cultural activities or conservation practices or both. These individuals were asked to give their opinions about the integration of traditional religious beliefs, knowledge, and practices into the management of the Rwenzori Mountains National Park. Individual interviews lasted for 20 to 40 minutes.

Fifteen expert interviews were conducted with traditional leaders (such as ridge leaders and chieftains) and Uganda Wildlife Authority wardens. These individuals were deemed to have expert knowledge of both traditional religious practices and current conservation strategies, and could offer practical suggestions as to how biodiversity conservation in the park could be improved through the integration of traditional religious beliefs and practices.

Twelve impromptu group interviews were conducted in situations where people were gathered for a meeting. This enabled collection of data in a group context and mitigation of biased responses associated with pre-arranged meetings where the objectives for the meeting are communicated to participants prior to the meeting.

Three focus group discussions were conducted with members of a local organisation (RweMCCA) aimed at integrating culture into the conservation of biodiversity in the Rwenzori Mountains and administrators of the Obusinga Bwa Rwenzururu, a cultural institution of the Rwenzori Mountain people. These discussions were important to enable a deeper understanding of traditional religious beliefs and practices in the management of the park, in determining the extent of beliefs in the community, and in identifying areas of conflict and disagreement within the community. The groups consisted of six to ten members and the discussion was conducted in the local language with the help of an interpreter.

Based on the consultative process undertaken through these methods, sacred sites were identified as a possible way of integrating traditional religious beliefs and practices in the management of the park. This was perceived by the CVCP as an opportunity for engaging the community further to propose a community-based conservation strategy based on sacred sites.

### 5.3.3 Designing the integration of traditional religious beliefs based on sacred sites

There is an expanding body of research demonstrating that many sacred sites support high levels of biodiversity. It is increasingly recognised by social scientists that this is not coincidental but is due to the protection afforded to these sacred areas by the custodian traditional communities (Byers, Cunliffe and Hudak 2001).

A sacred site is an area of special spiritual significance to peoples and communities (Harmon 2002). Many sacred sites are associated with indigenous communities that use a wide variety of natural resources for their survival, economy, medicines, religious rituals, and other purposes (*ibid.*). Historical, cultural, and spiritual aspects of the ecology of indigenous communities are grounded in biodiversity, ecosystems, and landscapes in sacred sites (Hadley 2002). For example, the Shona people who live in the Zambezi Valley of northern Zimbabwe consider trees, rivers, pools, mountains, and even whole mountain ranges to be sacred (Murombedzi 2003). Their concept of sacred connotes something that is life-sustaining and linked to rain and the fertility of the land (Harmon 2002).

Sacred sites have been highlighted in some situations as a basis for biodiversity conservation (Beltrán 2000). Sacred sites may either intentionally or coincidentally promote the conservation of biodiversity (Anderson and Berglund 2003). It could be that they are associated with certain taboos linked to religious beliefs and rules of access that restrict some practices from taking place there. The management of sacred sites by indigenous people is said to be one of the ways that can complement national parks and other protected areas established by governments to conserve biodiversity (*ibid.*). For instance, in the Zambezi Valley, deforestation was found to be least 50 per cent lower in sacred forests than in their secular counterparts. It was discovered that 133 species of native plants can be found in these sacred forests whereas they are threatened, endangered, or extirpated elsewhere in Zimbabwe (Murombedzi 2003). Based on such examples, the integration of traditional religious beliefs and practices associated with sacred sites presented a better opportunity for enhancing biodiversity conservation in national parks than strategies imposed by governments and international agencies.

In the Rwenzori region, based on the information gathered from the community, 14 sacred sites associated with local people's religious beliefs and practices were identified, mapped, and described.

It was realised that most of the sacred sites identified were located near the park boundary. Principle 2 of the Sacred Natural Sites Guidelines for Protected Area Managers (Wild and McLeod 2008) requires the use of zoning as a standard tool of land use planning and management of areas with natural sacred sites. Relative to the park zones, most of the identified sacred sites were in or near the buffer zone. This meant that access to these sites would conform to the provisions in the park management plan that restricts human activities in the strict nature zone but allows negotiated access to the buffer zone.

Sacred sites varied in nature and form: six were plants (trees and shrubs), six were hills, and two were stones. The distance of sacred sites from the park boundary also varied. The furthest was 10km from the

boundary into the park. Sacred sites were said to be important areas to the local community for (a) religious worship, (b) tourism, (c) the expression of the traditional culture, (d) ridge cleansing, (e) sacrificing to the gods, (f) healing various diseases, and (g) securing livelihood and welfare. This further revealed that sacred sites were associated with the performance of traditional practices influenced by traditional religious beliefs.

It was also revealed that specific sacred sites were used for particular rituals that served specific purposes. This meant that in the process of planning community-based conservation, it was unlikely that alternatives for sacred sites could be found. Therefore, an exploration of how to integrate traditional religious beliefs and practices through sacred sites encompasses the possibility of provision of alternatives, as is often the case with resource use agreements where it is agreed that a certain amount of resources can be extracted.

#### 5.3.4 Local people's interests in the integration of their beliefs into the management of the park

Effecting community-based conservation through traditional structures influences the successful conservation of biodiversity in national parks (Muhumuza and Balkwill 2013). This happens when the local people and especially those managing the traditional structures have an interest. Respondents expressed a need to revert ownership not only of sacred sites but also of the land on which they 'sit' to the traditional owners. Exploration of views expressed by the local people revealed various interests. These were distinguished into two categories: cultural interests and economic interests.

Regarding cultural interests, local people indicated a positive attitude towards the integration of traditional religious beliefs associated with sacred sites into the management of the park. This was evident from the responses given:

*We are happy that our culture is now being recognised by Uganda Wildlife Authority and we shall now work together to ensure that our mountain is protected.*  
(CVCP 2007)

Some local community members indicated that access to sacred sites is an important factor for defining their cultural identity.

*Sacred sites in the mountain define our culture and for long they have been abandoned due to the creation of the park, and the rangers have been restricting the people from going there and yet it is important for our survival.*  
(CVCP 2007)

The interests were not only among the old people; some respondents stated that the young were also interested.

*The interests in sacred sites is not only for the old people like me but also the young ones are keen at learning what used to take place in our cultural traditions and allowing us to start practising our*

*rituals in these sacred sites will also help to mitigate some of the problems we are currently facing. The young people will also find a way of being interested in their culture and promote it to tourists instead of engaging in lousy activities in trading centres.*

(CVCP 2007)

Two factors seemed to drive the cultural interest of the respondents to have access and to manage sacred sites. Firstly, they perceived access to sacred sites as a way of recovering their culture and performing traditional religious practices for the sake of their cultural identity. Secondly, they regarded the access and use of sacred sites as a way of re-possessing what traditionally belonged to them and their forefathers.

It was also revealed that as a result of religious practices in sacred sites, these sites had a diversity of plants and animals compared to other neighbouring areas. Respondents stated that this could have happened not because these areas were intentionally conserved but as a result of the taboos associated with them. A follow-up probe on this issue revealed that such taboos were to ensure that the sacredness of the site was maintained.

*It is just like the churches these days, one is expected not to play around at the altar, or collect money from the altar which Christians have offered to God, and this is for purposes of giving respect to a place that is considered holy. Similarly, sanctions on sacred sites were put in place to keep the area holy.*

(CVCP 2007)

This was another strong point which indicated that sacred sites could offer a way of restricting resource extraction from some areas in the mountains. However, as a way of exploring the potential risks associated with traditional practices in sacred sites, it was further necessary to investigate the materials that were used in performing religious rituals within them. According to the regulations of the Uganda Wildlife Authority, people are restricted from taking certain materials inside the park for fear of posing potential risks to the plants and animals therein. Respondents explained about the various materials necessary for performing religious rituals. Some of the materials were to be obtained from outside the park and others from inside the park (Table 7.2).

The Uganda Wildlife Authority regulations do not permit taking the identified materials, especially domestic animals, to the park, and yet these were required for the performance of religious practices in sacred sites. The community members pointed out that religious practices cannot be conducted without these materials. This was an issue for negotiation between the park staff and the local people about how religious rituals would be performed without these materials. For instance, it was revealed that the goat is not killed in ritual performance but left to wander in the mountains. After negotiations between the local community and the Uganda Wildlife Authority staff, it was agreed that after the ritual, such a goat could be captured by people who are not associated with the ritual such as rangers. This would fulfil the expectations of the park staff as well as the local community. This was an example of the adaptive integration

**Table 7.2 Basic materials required for performing religious rituals in sacred sites**

Materials obtained from outside the park	Number	Materials obtained from inside the park	Number
Hen or cock	2–4	A bunch of spear grass	1
Eggs	2–8	Pieces of flexible branches of a plant locally called 'Mulyangote'	50
Bunches of green bananas	2	Pieces of dry wood	Many
Stems of sugar canes	20	Strands of 'Emikole' as tying material during the construction of shrines	Many
Clusters of purple bananas	4		
Goats	2		

Source: Authors' own.

of traditional religious beliefs and practices into the management of national parks. Traditional religious beliefs need not be integrated into the management of the park in exactly the same way as they operated in the traditional context.

Regarding economic interests, local people's views indicated that the community perceived sacred sites as areas that would easily generate income, especially when developed for cultural tourism. This was revealed when they were asked about the activities that they would conduct in those sacred sites.

Associating sacred sites and traditional religious rituals with economic benefit was not a traditional practice. This was an indication that community-based conservation interventions also need to be linked to economic benefits to the community. This demands that attempts to integrate traditional religious beliefs and practices into the management of national parks need to take into account the economic needs of the people or how they can be supported by other economic interventions.

The ownership of sacred sites was also an issue for consideration regarding the integration of religious beliefs associated with the sacred site into the management of the park. Traditionally, sacred sites were owned by various categories of individuals and organised groups. In the traditional cultural context, 'ownership' meant that power was vested upon ridge leaders, chieftains, and clan leaders to oversee the activities that took place in sacred sites, at some unknown time in the social–cultural history of the Rwenzori Mountain people. This power was passed on from father to son, through many generations. When community members wished to access sacred sites, they would seek permission from those with vested power to manage the sites.

#### 5.4 Proposals on the way forward by the Uganda Wildlife Authority staff and by the local community

Two proposals, one by the Uganda Wildlife Authority and another by the local community were suggested on how local people's beliefs, knowledge,

and practices could be integrated into the management of the park through sacred sites.

#### 5.4.1 Proposal 1 by the Uganda Wildlife Authority staff

This proposal was based on the mandate that the Uganda Wildlife Authority has for the management of national parks in Uganda. Other than the Uganda Wildlife Authority, there was no individual, group, or organisation authorised to manage national parks and the resources therein. According to Uganda Wildlife Authority staff, they were cognisant of other stakeholders and appreciated their efforts and concerns regarding the conservation of biodiversity and were willing to work with them.

In this proposal, the Uganda Wildlife Authority would sign an agreement with individuals wishing to access sacred sites, provided that those individuals offered information about the location of sacred sites and a detailed description of what they would do when they got to the sacred site. Among other roles, Uganda Wildlife Authority staff would be involved in monitoring activities taking place at these sites. An identified local organisation or a resource user group and Obusinga Bwa Rwenzururu would serve as left and right ‘arms’ of the Uganda Wildlife Authority to support regulated access and use of sacred sites in the park.

#### 5.4.2 Proposal 2 by the local community

The local community proposed that collaborative management of sacred sites be done through the traditional leadership structure based on what was in place before the park was created. According to this proposal, an agreement on the use and management of sacred sites would be signed between the Uganda Wildlife Authority and Obusinga Bwa Rwenzururu.

However, the Uganda Wildlife Authority would monitor Obusinga Bwa Rwenzururu activities and Obusinga Bwa Rwenzururu would, in turn, monitor the use of sacred sites by the community. To do this, Obusinga Bwa Rwenzururu would, where necessary, have to work with community-based organisations. These organisations would be delegated by Obusinga Bwa Rwenzururu to conduct some of the activities it is mandated to do in agreement with the Uganda Wildlife Authority. If it was deemed crucial, however, the Uganda Wildlife Authority would monitor the activities of sacred site users directly.

## **6 Discussion on the successes and failures of the project regarding the integration of religious beliefs in conservation**

The Rwenzori Mountains National Park is already a protected area under the management of the Uganda Wildlife Authority and for many years the local people have been prohibited from accessing and performing religious beliefs in the sacred sites therein. The proposal that sacred site users sign agreements with the Uganda Wildlife Authority directly served the Uganda Wildlife Authority well because the sacred sites are in the protected areas and should be managed by the Uganda Wildlife Authority. Also, the Uganda Wildlife Authority has experience in planning and can bring technical capacity and tools to the process. The consideration of access to sacred sites as part of resource use agreements in the park management plan, as well as the creation of job roles focused on cultural values, conservation

rangers, and conservation wardens, are examples of positive efforts in the integration of local people's traditional religious beliefs into the management of the park.

However, given the past history of resentment and conflict between the Uganda Wildlife Authority and the community members (Muhumuza 2006), engaging the Uganda Wildlife Authority and the local people to sign an agreement directly could not lead to attaining the objectives of encouraging the local people to support the conservation of the park. From the interviews with local community members, it was evident that they do not have trust in the Uganda Wildlife Authority staff at all. Therefore, signing an agreement with them might be perceived to be similar to the prevailing arrangements for local people to access the park that are not as effective as described previously. Even now, local communities are not happy that the two sacred sites that were identified and developed through the CVCP (Buremba and Katwekali) are not functional and the local communities use this as an example of Uganda Wildlife Authority's lack of commitment to fulfil its promises.

Additionally, although the Uganda Wildlife Authority recognised existing structures of collaborating with the local people, there were weaknesses in the proposal of signing agreements with individual resource users. There are over 100 sacred sites in the Rwenzori Mountains National Park and this meant signing over 100 agreements. Even if it is possible to sign all those agreements, it is complicated on a practical level, given that each agreement may have its unique terms. It would have been preferable for the Uganda Wildlife Authority to sign an agreement with an 'umbrella' organisation that would be mandated to licence, provide access to sacred sites, and monitor the performance of traditional religious beliefs in those sites. According to the local community, such an umbrella organisation would extend beyond sacred sites but would also include other components of the traditional religious belief system. The community was concerned that the CVCP only considered a narrow perception of their traditional religious beliefs, as one respondent pointed out:

*The integration of religious beliefs was based on a few sacred sites but even if they had considered all the sacred sites, it would still be only a narrow integration of our religious belief system as other aspects such as taboos, totems, rules and regulations would be left out. A whole system integration is needed.*

(Community interview 1)

A decentralised co-management system coordinated by an umbrella organisation would be necessary to handle the existing communication gap that currently exists between Uganda Wildlife Authority staff and the local community.

Another challenge that hindered the success of the proposed way forward by the Uganda Wildlife Authority was the absence of a direct link between Obusinga Bwa Rwenzururu and a local organisation or resource user group. This made it difficult for the activities of each organisation to complement each other.

The way forward advanced by the community in Proposal 2 was feasible only if the suggestions were indeed implemented. These could have been strengthened by Obusinga Bwa Rwenzururu signing an agreement with the resource users. Obusinga Bwa Rwenzururu could take up the role of locating the spots with the resources the community requires, finding out the number of people who need the different resources, and requesting permission for the community to access the mountain for these resources. The success of this proposal could have depended on a good relationship between the parties involved. Vesting power in Obusinga Bwa Rwenzururu by the Uganda Wildlife Authority could have been one way of engaging the local community in the planning and management of the park. The Obusinga Bwa Rwenzururu, based on its nature as a traditional cultural institution, has the capacity of mobilising the local community and contributing the necessary traditional religious beliefs and practices and structures for effecting collaborative resource use. However, it may be limited in technical skills and finances to effect conservation actions. In this regard, it needs the support of the Uganda Wildlife Authority. The two institutions working together could mitigate the limitations of each organisation in implementing conservation actions independently.

One of the ways the Uganda Wildlife Authority could support the local community would be through the creation of an income stream based on a tourism product encompassing traditional religious beliefs and practices. A lack of this community tourism was one of the concerns that the community had with the Uganda Wildlife Authority management as one respondent pointed out:

*One major thing that has failed to help the community achieve is the establishment of community tourism around the protected areas that is based on local people's traditional religious beliefs.*  
(Community interview 4)

Given the livelihoods needs of the local community, a strong consideration of community-based tourism as a source of income for the local communities would further enhance a positive relationship with the park management.

### **7 Key lessons worth noting from the case study**

There is now an emerging body of knowledge generated by both biological and social scientists that describes the complexity and sophistication of many indigenous religious practices. These practices are associated with natural resource use in understudied regions such as the Rwenzori Mountains. Conservation efforts worldwide are slowly being directed towards understanding the basis for natural resource use among indigenous communities (Mutebi 2005). The need to understand the basis for natural resource use among indigenous communities provides an opportunity to investigate the traditional religious practices that could potentially enhance the conservation of biodiversity in the Rwenzori Mountains National Park.

The investigation of those practices is important because as the case from the Rwenzori Mountains National Park shows, prior to 1941, the Rwenzori Mountains were without marked boundaries and were managed and

controlled by local communities (McCall 1996). For centuries, the Rwenzori Mountain people depended on the mountain resources, and regarded the mountain as a free gift of nature (Stacey 1996). The Rwenzori Mountains had always been important for the livelihoods and culture of the local communities until part of the area was gazetted as a national park, which disenfranchised local people by making access illegal (McCall 1996). Ridge leaders and elderly members of the local community, just like elsewhere where local people are displaced during the creation of a protected area, claimed that the important natural resources were well conserved through indigenous practices. Before the area was declared a national park, there were traditionally set norms and customs that were followed while certain religious rituals and the harvesting of resources was carried out. Local people were enthusiastic about revitalising traditional religious practices in order to improve their welfare.

Although it was claimed that the Rwenzori Mountains were a cultural symbol to the Rwenzori Mountain people (Stacey 2008), a comprehensive inventory of traditional religious beliefs and practices associated with natural resource use was lacking prior to the CVCP. Without such an inventory and taking it into account, the management of the national park and conservation efforts could not succeed. This is because at the present time some local people engage in the illegal use of resources from the park as a result of the need for spiritual enrichment through traditional religious beliefs and practices. These were not recognised during the establishment of the park and even presently they have been ignored in the implementation of community-based conservation strategies.

The creation and management of national parks and the resources therein is a highly scientific endeavour (Colding and Folke 2001; DeGeorges and Reilly 2008; Maffi and Woodley 2010) and yet many traditional religious beliefs and practices associated with biodiversity conservation lack scientific explanations. The traditional religious beliefs and practices are based on folklore which is not based on a scientific method of inquiry. Scholars have not empirically demonstrated a link between these factors and the intention to conserve (Alvard 1993; Diamond 1986). For instance, on scientific grounds, the Irungu spirit described in this case study (Table 7.1) cannot communicate with wild animals in the Rwenzori Mountains. Similarly, there is no scientific or logical explanation for how an insect scratching its head with its hind leg or spreading its wings could mean that somebody would die. Also, various rituals were used to foretell happenings but did not show how they ensured the sustainable utilisation of resources.

What is known in the literature is that some trees cause allergies but there is no scientific relationship or logic between cutting a tree and a person cutting that tree going mad. Similarly, there is no scientific explanation for the death of someone's wife or children and the killing of young monkeys. Also, why would women become barren if they climbed far into the mountains or went to sacred sites? In addition, the scientific literature does not offer a logical explanation about why a hunter was not supposed to have sexual intercourse with his wife the night before going to hunt. Could the reason have been that the hunter sleeps better and could be more alert during hunting or he is able to save energy for hunting since sexual intercourse is biologically known as an energy-consuming activity

(MacDonald 1997)? Taboos are spiritually based, superstitious, fatalistic, and are not based on any scientific premise (Snively and Corsiglia 2001).

The factors associated with traditional religious beliefs and practices have not previously been considered in the realm of conservation science (Byarugaba 2010; Ceriaco *et al.* 2011; Maffi and Woodley 2010) and this could be the same case for the Rwenzori Mountains National Park. This is a common shortcoming of community-based approaches. Even if they are not acceptable to scientists, it does not mean that they have no influence over the natural resource use practices of local people. They need to be considered in strategies for addressing some of the problems associated with the conservation of biodiversity in rural areas. For the Rwenzori Mountains National Park, the influence of the integration of traditional religious beliefs on biodiversity resources has not yet been ascertained, but what is evident in this case study is that the integration has improved relations to some extent between the park management and the local community.

## 8 Conclusion

This chapter aimed at describing the process undertaken in attempts to integrate traditional religious beliefs and practices into the management of the Rwenzori Mountains National Park. These traditional beliefs and practices were closely linked to sacred sites. Therefore, sacred sites were identified as an avenue for involving people in the management of the park despite access to them being illegal, as were the other resources in the park.

Although sacred sites were located in the park, they are traditionally owned by the respective ridge leaders who had interests in managing them. Access, utilisation, and management of sacred sites are not expected to be exactly as they were in the traditional context prior to the creation of the park. For instance, in addition to cultural interests, the local people also expressed economic interests that were not associated with the sacred sites in a traditional context. Re-accessing these sites would involve having legalised access to them, making and maintaining access trails to them, constructing sanitation facilities at those sites, and developing some of them into tourist destinations and camping sites.

The process for the development and implementation of collaborative management of national park resources that are based on traditional religious beliefs and practices should consist of a series of consultative workshops with representatives of the different stakeholders in the community. Planning needs to be a legitimate formal process with extensive consultations carried out by a group of selected, relevant, and neutral parties, as outlined in this case study.

The major stakeholders (in this case the Uganda Wildlife Authority) need to be an important part of the process because they have a legal mandate. The traditional institutions need to be involved as they are a key interested party. One of these institutions should be an identified local organised group, preferably with a traditional management role, and one which represents community interests. Other partners could be part of the committees that could coordinate and monitor access and use. In order to bring some of the identified partners on board, more painstaking collaboration strategies, stakeholder meetings, seminars, and workshops are necessary in an attempt to integrate traditional religious beliefs and practices into the management of national parks.

# Annexe 1 Focus group discussion (FGD) guide for community members close to the park

**Case study on integrating Freedom of Religion or Belief (FoRB) in development or humanitarian programmes in and around the Rwenzori Mountains National Park, Western Uganda**

## **FOCUS GROUP DISCUSSION GUIDE FOR COMMUNITY MEMBERS AROUND THE PARK**

### Introduction

Dear respondents,

You are kindly invited to participate in this focus group discussion as part of a research process where Universal Institute of Research & Innovations has been engaged by the Institute of Development Studies through the Coalition for Religious Equity and Inclusive Development (CREID) to write a case study on the **“The struggles and opportunities for integrating freedom of Religion and beliefs (FoRB) in development in Humanitarian Programme”**. The research is purely for gathering information for development purposes in understanding how religion and belief are integrated in development. Your responses will be handled with utmost confidentiality without at any one time singling out one individual respondent in any analysis in such a way that their responses could be recognised. Participation in this case study is voluntary and thus you can decide not to answer any question or all questions.

If you have further information and questions at any time about this research or the procedures used, you may contact Prof. Moses Muhumuza OR Dr. Mark Kaahwa.

### Familiarisation phase

- 1 What do you understand by freedom of religion and beliefs?
- 2 How easy is it to integrate freedom of religion and beliefs in development work?

### The traditional religions/beliefs and how they are expressed

- 1 What do you understand by traditional religions?
- 2 What do you understand by traditional beliefs?
- 3 Give examples of traditional religions and beliefs that you know.
- 4 Explain if you have freedom to express your religious beliefs.
- 5 Why do you think the traditional religious beliefs of the local people were not initially considered in the establishment of the Rwenzori Mountains National Park?

Approaches and strategies that were used in the integration of religious beliefs in the management of the Rwenzori Mountains National Park

- 1 What traditional religious beliefs were eventually integrated in the management of the Rwenzori Mountains National Park?
- 2 What approaches and strategies were used to integrate the traditional religious beliefs in the management of the park?

Successes and failures of integration of traditional religious beliefs in the management of the Rwenzori Mountains National Park

- 1 Can you point out and explain what you consider to be the successes in integrating your traditional religious beliefs in the management of the park.
- 2 What are some of the failures encountered during the integration of religious beliefs in the management of the park?
- 3 What testimonies can you give concerning the integration of traditional religious beliefs in the management of the park?

**---Thanks so much for your precious time---**

## Annexe 2 Key informant interview guide for Uganda Wildlife staff working in the Rwenzori Mountains National Park

**Case study on integrating Freedom of Religion or Belief (FoRB)  
in development or humanitarian programmes in and around the  
Rwenzori Mountains National Park, Western Uganda**

### **KEY INFORMANT INTERVIEW GUIDE FOR UGANDA WILDLIFE STAFF WORKING IN THE RWENZORI MOUNTAINS NATIONAL PARK**

#### Introduction

Dear respondents,

You are kindly invited to participate in this key informant interview as part of a research process where Universal Institute of Research & Innovations has been engaged by the Institute of Development Studies through the Coalition for Religious Equity and Inclusive Development (CREID) to write a case study on the **“The struggles and opportunities for integrating freedom of Religion and beliefs (FoRB) in development in Humanitarian Programme”**. The research is purely for gathering information for development purposes in understanding how religion and belief are integrated in development. Your responses will be handled with utmost confidentiality without at any one time singling out one individual respondent in any analysis in such a way that their responses could be recognised. Participation in this case study is voluntary and thus you can decide not to answer any question or all questions.

If you have further information and questions at any time about this research or the procedures used, you may contact Prof. Moses Muhumuza OR Dr. Mark Kaahwa.

#### Familiarisation phase

- 1 What do you understand by freedom of religion and beliefs?
- 2 How easy is it to integrate freedom of religion and beliefs in development work?

#### The traditional religions/beliefs and how they are expressed

- 1 What do you understand by traditional religions?
- 2 What do you understand by traditional beliefs?
- 3 Give examples of traditional religions and beliefs that you know.
- 4 Why do you think the traditional religious beliefs of the local people were not initially considered in the establishment of the Rwenzori Mountains National Park?

Approaches and strategies that were used in the integration of religious beliefs in the management of the Rwenzori Mountains National Park

- 1 What traditional religious beliefs were eventually integrated in the management of the Rwenzori Mountains National Park?
- 2 What approaches and strategies were used to integrate the traditional religious beliefs in the management of the park?

Successes and failures of integration of traditional religious beliefs in the management of the Rwenzori Mountains National Park

- 1 Can you point out and explain what you consider to be the successes in integrating traditional religious beliefs of the local people in the management of the park.
- 2 What are some of the failures encountered during the integration of religious beliefs in the management of the park?
- 3 What testimonies can you give concerning the integration of traditional religious beliefs in the management of the park?

**---Thanks so much for your precious time---**

## Notes

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## PART 4

### **External Actors' Promotion of FoRB: Ideology and Political Will**

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## Chapter 8

# International Assistance and Impoverished Religious Minorities in Pakistan<sup>\*†</sup>

Asif Aqeel<sup>1</sup> and Mary Gill<sup>2</sup>

### 1 Introduction

Pakistan is among 20 countries where the bottom poorest one billion people live (Von Braun and Gatzweiler 2014: 8). At least a quarter of the population in Pakistan suffers from extreme poverty. The high level of unemployment and low gross domestic product (GDP) growth rate, rising levels of ethnic and religious strife, natural calamities, capacity constraints, and exclusion of the poor and women from the decision-making process are cited as major hurdles to economic growth. To tackle extreme poverty, the World Bank is investing heavily in Pakistan, with the ‘twin goals of poverty reduction and shared prosperity’ (World Bank 2014b: 13). Though most religious minorities are among the extremely poor population, research conducted on a World Bank project shows that this prosperity is not shared by non-Muslims.

Non-Muslims account for about 4 per cent of the total population of 210 million people. A recent study titled *The Index of Religious Diversity and Inclusion in Pakistan* (Aqeel 2020) identifies that Jews lived in Pakistan at the time of its creation, but the majority of them later migrated to other countries. Only a few hundred Parsees (Zoroastrians) and Buddhists are left in Pakistan (Aqeel 2020). According to the National Database and Registration Authority, there are about 33,000 Baha’is and 6,146 Sikhs in Pakistan (Ghauri 2012). Across the globe, ‘ultra-poverty is especially high among minorities and marginalised people’ (Von Braun *et al.* 2009: 8) and the same is true for Pakistan, particularly among Christians and scheduled-caste Hindus.

If the percentage of non-Muslim groups were applied according to the 1951 census, then Christians and scheduled-caste Hindus would make up roughly 80 per cent of religious minorities. Missionary sociologist Wayne McClintock believes that the ‘majority’ of Christians are of Dalit origin, while Elizabeth Koepping (Koepping 2011: 9) writes that ‘four-fifths’ of Christians are of this origin. Yet, the author of this chapter, based on everyday interaction, believes that the number of Dalit Christians must be higher than 90 per cent. Scheduled-caste Hindus were clearly a separate religious entity in the census and government records until 1947. For some reason, during General Muhammad Zia-ul-Haq’s dictatorial rule,

scheduled-caste Hindus were lumped together with upper-caste Hindus in the 1981 census. The 1998 census separated them again, but now the clear distinction is blurring, though it remains clearly evident in political, cultural and economic settings. These two minority groups also suffer from enforced labour in menial occupations and social exclusion, stigma and name-calling because of their so-called 'untouchable' caste status (McClintock 1992).

Although the Constitution of Pakistan guarantees equality of fundamental rights to everyone, it segregates people and privileges based on the binary dichotomy of Muslim and non-Muslim; hence, it promotes inequality and exclusion based on religious identity. The constitutional bar delimits minorities from becoming president or prime minister of the country, prescribing them as second-class citizens. In the political system, for three decades, non-Muslims could not vote for Muslims but had to elect their own co-religionists, which excluded them from mainstream politics. Since 2002, they have been able to vote or contest elections, but hardly any non-Muslims get elected to general seats (this does not include Ahmadis, who only vote for their co-religionists).

Since its creation in 1947, Pakistan has witnessed several outbreaks of violence against religious minorities. Blasphemy laws have given rise to their persecution and a disproportionately high number of blasphemy cases relative to the size of their population are registered against Ahmadis and Christians (Aqeel 2020). Minorities report: religious bias in textbooks; abduction and forcible conversion of their minor girls; encroachment of their graveyards; being dubbed as sympathisers of India and the West; burning and ransacking of their places of worship; and unfair treatment at the hands of law enforcement agencies (Aqeel 2020).

Pakistan has committed to the Sustainable Development Goals (SDGs), which commit to achieving 17 goals by 2030, including ending poverty, zero hunger, inclusive and equitable education, clean water, economic growth and reduced inequalities for everyone, and 'leaving no one behind' (Government of Pakistan 2019). But this commitment cannot be fulfilled without including smaller group entities, such as pariahs and religious minorities, in development programmes.

The project under consideration, titled Pakistan Poverty Alleviation Fund III (PPAF-III), was implemented at the time the Millennium Development Goals (MDGs) were turning into the SDGs. The World Bank, which is the major player in Pakistan on poverty reduction programmes, recognises that exclusion based on gender, race, caste, ethnicity, disability or religious identity is at the heart of the poverty of these groups; therefore, their inclusion matters for inclusive development (World Bank 2013a). This chapter uses key informant interviews and focus group discussion (FGD) analyses of the World Bank's US\$250m project, which was implemented from July 2009 to March 2016 through PPAF-III, including groups that had been 'otherised' based on their caste and religious status in the design and implementation of the project.

Our research shows that inclusion of women and people with disabilities was a high priority of the project, but not inclusion of religious minorities. Women were included from beneficiary to executive member levels of the three-tier organisations (TTOs). It was found that people with disabilities

as beneficiaries were the second-highest priority in terms of inclusion but not in decision-making in TTOs, except in Sanghar district. Confirming our findings, PPAF's own research on 850 TTOs in 2014 found that only 7 per cent had representation of at least one person with a disability on the executive board (Khalid *et al.* 2019).

The first reason for exclusion of religious minorities is that the PPAF has categorised all districts of Pakistan from high-priority districts, which are extremely poor, to low-priority ones. Most Christians live in Punjab in districts that are on the PPAF's low-priority list, but Christians live in ghettoised neighbourhoods that are the epitome of generational poverty and neglect. In this PPAF scheme of tackling poverty, at least, Christians living in these districts are ignored and left out. Scheduled-caste Hindus, who are mostly bonded field labourers, suffer the same fate in several rural areas of Sindh province.

The second reason is that the population of religious minorities varies in each district. For example, in the districts where the research was conducted the population of minorities varied from 1 per cent to 27 per cent. There were minority populations in at least three districts but not in the union councils (UCs)<sup>3</sup> where PPAF-III was conducted. FGDs with local support organisation (LSO) office bearers showed that most of the UCs selected for implementation of the project were the same as where the PPAF had conducted earlier projects. This meant minorities had been neglected in earlier projects, as they were in this project despite the proposal design requiring their inclusion. Furthermore, in each UC where there were no religious minorities, it was found that in adjacent or nearby UCs there were religious minorities who could have been included in the project, but no attempt was made to include them.

Only in one district out of the five where the research was conducted, Sanghar, were religious minorities included in the implementation of the project as beneficiaries, and on the board or as executive members of locally established organisations. It was found that the PPAF implementation partner organisation (PO) in Sanghar was sensitive towards minorities. However, it is possible that the size of the non-Muslim population in the district (27 per cent) could have significantly affected the decision to include non-Muslims in the project.

## 2 Background

Historically, Pakistan has had a rich and diverse cultural and religious heritage. About 44 per cent of the population living in the lands that became Pakistan in 1947 was non-Muslim (American University 1965: 38). Partition with India took place on the basis that Hindus and Muslims were essentially dissimilar in their politics, religion, culture and language, and hence could not live together. After partition, at least 15 million Hindus, Muslims and Sikhs were uprooted and crossed borders to be in the state of their religion. Partition was 'accompanied by a death toll credibly estimated at between 200,000 and 2 million' (O'Leary 2012). Therefore, since the country's inception, religion has been part and parcel of statecraft.

Today, the 4 per cent non-Muslim population in Pakistan consists of Christians and Hindus (both upper caste and scheduled caste) and other smaller religious identities, such as Ahmadis (a sect which considers itself

Muslim, but is constitutionally declared non-Muslim), Baha'is, Sikhs, Kalash people and Parsees (Zoroastrians). Most Christians and scheduled-caste Hindus come from untouchable Dalit backgrounds. Under British rule, untouchables were identified as 'depressed classes' and special quotas in education, jobs and assemblies were allocated for them. The names of these depressed classes were added to a schedule of the Act of India in 1935 and since then they have been known as the scheduled castes.

In the traditional system of four mutually exclusive caste groups based on social stratification, Brahmans (priests) were at the top and Sudhras (menial servants) were at the bottom. There was a fifth group, the 'outcastes' or untouchables, who were not allowed to live inside villages, acquire education or participate in any social, religious or political activity. They were assigned occupations that were considered 'sinful' and insulting (Aqeel 2018b).

After Pakistan was created, there was strong support to root out caste prejudices. Article 20 of the 1956 Constitution of Pakistan stated: 'Untouchability is abolished and its practice in any form forbidden and shall be declared by law to be an offence.'<sup>4</sup> But this ambition was gradually lost in the following years as Pakistan became more Islamised. At the Universal Periodic Review of the United Nations Human Rights Council in 2008, Pakistan rejected the practice of untouchability, saying: 'It is a Muslim country and does not have the concept of *dalit*... it is free from such kind of prejudices, and the existing norms do not contain discrimination on the basis of caste or creed' (Aqeel 2014). But the fact is that caste prejudices are the primary reason for slavery in South Asia and Pakistan ranks eighth in the Global Slavery Index (Global Slavery Index 2018). Most of the bonded labourers in the brick kilns of Punjab are Christians, and most of the bonded peasants in Sindh are scheduled-caste Hindus (Ercelawn and Nauman 2001).

About 60 per cent of the Pakistani population lives in rural areas and 80 per cent of the poor live here (Ahmed 2018). The poverty headcount, using the national poverty line, fell from 64.3 per cent in 2001 to 24.3 per cent in 2015 (Redaelli 2020). The main scheduled castes in Pakistan are *meghawars*, *kohlis* and *bheels*. Some of the scheduled-caste Hindus are insulted with the term *dhed*, 'carion eater'.<sup>5</sup> Those living as bonded landless peasants mostly belong to the *kohli* and *bheel* castes in Sindh. Similarly, Pakistani Christians predominantly come from the most downtrodden Dalit caste, *chuhras* (sweepers), which is now a highly pejorative term. Many of them live in illegal urban settlements in cities and work as sanitation workers or do other menial jobs. They suffer extreme poverty, unemployment and illiteracy. The PPAF's overall approach excludes religious minorities in its implementation.

The PPAF in 2013 divided all districts of Pakistan into five zones based on poverty headcount: Extreme Poverty Zone – 1, Extreme Poverty Zone – 2, High Poverty Zone – 1, High Poverty Zone – 2 and Low Poverty Zone (Naveed, Wood and Ghaus 2018). Most of the Christian population (PPAF 2019) live in either the Low Poverty Zone districts or High Poverty Zone – 2, which are low on PPAF's priorities.

The demography of Hindus is different in Sindh province from the Christians in Punjab. Though the population size of districts in Sindh is comparatively smaller than that of Punjab, in a few districts the Hindu

**Table 8.1 Christian concentration in districts**

Serial	District name	Province	Total population	Christian population	Percentage of total district population (%)	PPAF priority zone ranking
1	Lahore	Punjab	11,130,000	550,000	5	Low Priority Zone
2	Karachi	Sindh	14,910,000	360,830	2.42 (Hasan and Mohib 2003)	Low Priority Zone
3	Faisalabad	Punjab	7,873,910	322,830	4.1	Low Priority Zone
4	Sheikhupura	Punjab	3,460,000	203,500	4.5	Low Priority Zone
5	Gujranwala	Punjab	5,014,000	220,624	4.4	Low Priority Zone
6	Sialkot	Punjab	3,894,000	155,760	4.0	Low Priority Zone
7	Kasur	Punjab	3,455,000	152,020	4.4	Low Priority Zone
8	Rawalpindi	Punjab	5,406,000	113,518	2.1	High Priority Zone – 2
9	Toba Tek Singh	Punjab	2,190,000	81,030	3.7	Low Priority Zone
10	Sargodha	Punjab	3,904,000	85,878	2.2	Low Priority Zone
11	Islamabad	Capital	2,006,572	82,269	4.1	Low Priority Zone
12	Sahiwal	Punjab	2,518,000	78,044	3.1	High Priority Zone – 2
13	Khanewal	Punjab	2,922,000	70,127	2.4	High Priority Zone – 2
14	Okara	Punjab	3,455,000	57,743	1.9	High Priority Zone – 2
15	Narowal	Punjab	1,710,000	56,421	3.3	High Priority Zone – 2

Source: Authors' own, compiled from Mehdi (2015) and Pakistan Bureau of Statistics (2017).

population is even close to half of the total population. Like Christians, they also live in their separate neighbourhoods in villages and cities.

### 3 Literature review

Poverty among Pakistani religious minorities, especially those from a Dalit background, has received virtually no academic attention. Since the founding of Pakistan, prominent people in the country, such as Muhammad Ali Jinnah (Grote and Röder 2012: 183) and his fierce hardline critic Maulana Abul A'la Maududi (A'la Maududi 1960), the founder of Islamist political party Jamaat-e-Islami Pakistan, have considered religious minorities as one of the most complex constitutional questions. Religious minorities are always presented in a binary dichotomy of Muslim and non-Muslim, where the latter are discussed in the context of protection, religious freedom, rights and citizenship status, and Pakistan's foreign relations with India and other countries as an 'Islamic state'.

It is probably against this backdrop that scholars such as Farahnaz Ispahani and rights activists such as Asma Jehangir (Dean 2018) define

**Table 8.2 Hindu population in Sindh province**

Serial	District name	Total population	Hindu population	Percentage of total district population (%)	PPAF priority zone ranking
1	Tharparkar	1,649,661	668,112	40.5	Extreme Poverty Zone – 1
2	Umarkot	1,073,146	510,817	47.6	Extreme Poverty Zone – 1
3	Sanghar	2,057,057	411,411	20.1	High Priority Zone – 1
4	Badin	1,804,516	359,098	19.9	Extreme Poverty Zone – 1
5	Mirpurkhas	1,073,146	350,918	32.7	Extreme Poverty Zone – 2
6	Hyderabad	2,199,463	263,935	12.0	Low Priority Zone
7	Sukkur	5,538,555	182,772	3.3	High Priority Zone – 2
8	Nawabshah	5,282,277	153,186	2.9	Extreme Poverty Zone – 2
9	Karachi	14,910,352	128,229	0.9	Low Priority Zone
10	Rahim Yar Khan (Punjab)	4,814,006	110,722	2.3	High Priority Zone – 1
11	Ghotki	1,646,318	110,303	6.7	High Priority Zone – 1
12	Khairpur	2,404,334	69,725	2.9	High Priority Zone – 1
13	Jacobabad	1,006,297	36,226	3.6	Extreme Poverty Zone – 2
14	Dadu	1,550,266	31,005	2.0	High Priority Zone – 1
15	Thatta	979,817	28,414	2.9	Extreme Poverty Zone – 1

Source: Authors’ own, compiled from Mehdi (2015) and Pakistan Bureau of Statistics (2017).

religious minorities as one homogenous out-group that indiscriminately suffers: ‘[d]iscrimination, harassment and violence’ (Ispahani 2017: 156). These authors and activists, however, often do not examine the socioeconomic aspects of minority communities. Factually, not all religious minorities suffer the same degree of terrorism, mob violence, forced conversion, charges of blasphemy, etc. (Aqeel 2020). The Minority Rights Group International report on Pakistan recognises the diversity and different challenges of minorities (Malik 2002). Parsees and Baha’is reportedly hardly suffer violence. Only Christians and Ahmadis have suffered suicidal terrorist attacks on their places of worship. Ahmadis, Parsees and Baha’is report no forced conversion of their minor girls. In the same vein, caste-based untouchability, social exclusion and stigma are only suffered by Christians and scheduled-caste Hindus (Aqeel 2020).

The reason for the disproportionate number of Christians’ working in sanitation is because members of the untouchable *chuhra* caste (McClintock 1992) were converted en masse in Punjab province through the efforts of US and European missionaries from the 1870s to 1920s. Missionaries

took a special interest in the poor economic status of these converts. In the 1930s, missionaries conducted research that showed that 70–92 per cent of Christian families in various districts were in debt (Davis 1939: 67). The Christian missionaries set up separate villages for the converts to initiate educational and economic revival. In later decades, the interests of academic missionaries shifted to chronicling the religious phenomenon and analysing social and political settings in which the mass conversion took place (see, for example, Stock and Stock 1978).

John Webster explains how the ‘Second Great Awakening’, which ended in 1840, brought thousands of Christian missionaries from the US and Europe to evangelise the world. Many of such missionaries came to Punjab province, which was annexed by the British in 1849 (Webster 2002). Historian Professor Jeffery Cox has examined how missionaries often had a love-hate relationship with the British Raj in their evangelical, educational and medical activities in Punjab (Cox 2002). Both of these scholars considered social and political dynamics, rigours of caste and transformational processes. Irish priest John O’Brien goes even deeper into the ethnography of these people, covering their history of dehumanisation, poverty and exclusion over millennia (O’Brien 2006). The focus of these scholars was on the Christians in pre-partition India.

Pieter H. Streefland was the first to see that conflict between Christians and Muslims was taking place both at religious and caste levels in the 1970s (Streefland 1979). Around this time, Miriam Adeney noted that to be a Christian in Pakistan meant ‘cleaning up other people’s urine and bowel movements for the rest of one’s life’ (Adeney 1984: 51):

He [the Christian] might empty cesspools with a bucket, pouring the contents into a tank towed by a tractor. Or he might be a latrine-cleaner, in charge of public toilets. Or he might be privately employed by families to tug their toilet boxes out of the compound wall and empty them. Or, if he is skilled, he might be a *kundiman* [sewer man] who unclogs pipes – but is threatened by sewer gas when he crawls beneath the streets to do his work.  
(*ibid.*)

Contemporary authors and academics in the past three decades have mainly focused on Christians in the context of Pakistan’s blasphemy laws, violence and ‘religious persecution’ (Fuchs and Fuchs 2020).<sup>6</sup> Likewise, Sara Singha discusses the persecution of Christians in her dissertation, but also caste, ritual impurity and outcomes of social exclusion such as their poor socioeconomic status and segregated residential neighbourhoods (Singha 2015). The most pertinent observation in recent times comes from a UK Home Office report: ‘While a small number of Christians are relatively prominent and prosperous, Christians are typically among the poorest in Pakistani society’ (Independent Advisory Group on Country Information 2018).

Unlike the Pakistani Christians, literature on Hindus is almost non-existent, probably because Hindus are synonymous with India, which is considered the arch-enemy of Pakistan. In this dearth of literature, the only – yet nonetheless most fascinating – account is the book *Hinglaj Devi* by Jürgen Schaflechner (Schaflechner 2018), adapted from his dissertation.

The book is about the pilgrimage of the Hinglaj temple but captures how visibility of Hindus has increased in the past two decades, their relations with Muslims, and inter-caste struggles between upper-caste and scheduled-caste Hindus over control of the temple and spiritual narratives.

On scheduled-caste Hindus, the only noticeable work is the report *Long Behind the Scheduled* (Shah 2007) that challenges the perception that untouchability is non-existent in Pakistan. Scheduled-caste Hindus are extremely poor, have very low literacy rates, live in segregated residences and often do not have national identity cards. The report notes that more than 90 per cent of bonded labourers in Sindh are scheduled-caste Hindus who are 'served food and tea in separate crockery at hotels and restaurants'. As their women wear distinctive garb, they are sometimes refused a seat on public transport (Shah 2007).

Sufi Hussain in his doctoral dissertation had discussed how discontent among scheduled-caste Hindus is growing out of their marginality as Hindus and as scheduled castes (Hussain 2019). Upper-caste Hindus dominate business and politics in Pakistan despite being very small in number (Aqeel 2020). The Pakistan Hindu Council, supposedly the representative body for all Hindus, does not have any scheduled-caste Hindus in its body. Several networks, which upper-caste Hindus fiercely criticise and discourage, are asserting their Dalit identity (*Dawn* 2020).

Caste is one of the most important social identity and status markers in Pakistan. However, it is academically the least researched subject in Pakistan and its existence in the country is officially denied. Sociologically, caste is defined as a 'closed form of social stratification', determined by 'birth' (Robertson 1977: 217) 'intimately connected' with division of labour (Dumont 1979: 35) and has survived among non-Hindus; for example, Christians and Muslims (*ibid.*: 91). It is not merely guaranteed by 'conventions and laws, but also by rituals' (Weber, cited in Gerth and Wright Mills 1946: 188), as Max Weber explains: 'caste is considered as making for a ritualistic impurity and to be a stigma which must be expiated by a religious act' (*ibid.*). It is unique to the Indian subcontinent and has been in existence for millennia. A few revisionist anthropologists, such as Nicholas Dirks (in Reich 2018) describe it as a colonial artefact. However, genetic studies show the institution has been practised for millennia (Reich 2018: 145) and men, especially, are locked into the endogamous family system (Wells 2017: 177). Transformation of four-class caste-based social stratification into ethnocentric groups called *qoum/zat* (caste) in Pakistan is well documented in Ahmed Usman's doctoral dissertation (Usman 2011). Usman's research finds that caste-based occupational endogamy is found in rural Punjab (Usman and Amjad 2013) and there is a relationship between voting patterns and caste hierarchies (Usman 2016). Usman, however, concluded that caste-based commensality rules and untouchability were 'virtually absent in [the] caste system practiced in Pakistan' (Usman 2017). It is true that the Brahmanic religious tinge of caste, referred to by Weber, has eroded in Muslim-majority Pakistan as Usman (2011) argues. However, the Brahmanic untouchability and refusal of commensality<sup>7</sup> patterns towards Dalit castes have survived, particularly in the context of Christians, and have been 'rearticulated' in Islamic 'religious overtones' (Aqeel and Gill 2019: i). A number of Muslims believe that Christians are born for

this work. For example, to briefly elaborate this, a June 2019 recruitment advertisement for the armed forces invited only ‘Christians’ to apply for sanitation jobs (OpIndia Staff 2019).

As Pakistan is in complete denial about the existence of caste-based disabilities such as untouchability and refusal of commensality, explanations for the relationship between caste, poverty and inequality are looked for in Indian society. Specifically, caste creates ‘unfree economic order’ and a segregated market that restricts ‘ownership of property’, ‘mobility of capital and labour’ and ‘acquisition of skill and education’ (Thorat *et al.* 2016), which are observed in the case of scheduled-caste Hindus and Christians in Pakistan.

Economic inequality in relation to the caste-based divide has been well researched in India and not in Pakistan. It has been found that caste ‘restricts occupational mobility’ and determines ‘one’s economic and social status’ (Kumar and Yazir 2017: 95). The ‘overarching conclusion’ of research by Borooah and colleagues (2014) was that ‘households’ outcomes with respect to their position on distribution ladder, or with respect to their chances of being poor, are dependent in large measure on their caste’. The researchers found a relation between illiteracy and poverty. While controlling for the variable of illiteracy, the researchers found that ‘caste significantly affects the possibility of being poor’ (*ibid.*).

Poverty is the lack of insufficient command of productive resources (material, cultural and social) (Pantazis *et al.* 2006) The poor generally have ‘common features, such as a lack of assets and education, but they also often belong to certain social groups – typically groups distinguished by race, color, social origin (caste), religion, or geographical location’ (Von Braun and Gatzweiler 2014: 205). Social exclusion of such groups is forced on them and pushes them to the ‘margins of social, political, economic, ecological or biophysical systems, preventing them from access to resources, assets, services, restraining freedom of choice, preventing the development of capabilities, and eventually causing (extreme) poverty’ (*ibid.*: 3).

Pakistan is among the countries where there is a high prevalence of poverty despite a ‘high economic growth rate’ (Von Braun and Gatzweiler 2014: 6). The 2013 World Bank report titled *Inclusion Matters: The Foundation for Shared Prosperity*, notes that: ‘Excluded groups are significantly less likely to receive the benefits of development investments’ (World Bank 2013a). We have learnt that ‘a growing economy by itself is no solution to the problem of poverty’ (Royce 2011: 11) and ‘a rising tide does not necessarily lift all boats’ (World Bank 2013a: xv). Literature shows that this understanding of inclusion has trickled down in the context of gender. For example, Muhammad Azeem Afzal, an associate professor at Hunan University, argues for inclusivity but it is limited to areas ‘such as gender equality, women’s empowerment, human rights’ (Ashraf 2017: 56). However, inclusive policies leave out religion- and caste-based exclusion and stigma. In the present case, we will look at the World Bank’s PPAF-III to see if it put in place measures for the inclusion of Christians and scheduled-caste Hindus.

#### **4 Methodology**

The PPAF-III project design described religious minorities as an ultra-poor and vulnerable group that needed special consideration during the

implementation of the project. Therefore, rather than looking for the impact of the project on religious minorities, the inquiry was about determining the level of inclusion of religious minorities in the project implementation process. In order to guide the study, the following broader research questions were formulated:

- 1 Do the districts and UCs selected by the PPAF for the project implementation have any religious minority population?
- 2 If there are Christians and scheduled-caste Hindus in the chosen districts, then do they need the type of assistance provided through PPAF-III?
- 3 Were any religious minority members included among the beneficiaries and/or the executive body of the TTOs?
- 4 Was overall inclusion of marginalised groups ensured in the implementation (i.e. inclusion of women, people with disabilities, minorities or any other groups on the margins)?

To answer these questions, the original research plan dedicated 2–4 weeks for deskwork and roughly 40 days for fieldwork. This included key informant interviews by phone; obtaining basic data from the PPAF and Bureau of Statistics offices in Islamabad; deciding on the scope of the research and the survey design; and selection of suitable research methods and data collection tools. The research team had done some deskwork and had met PPAF and Bureau of Statistics officials in Islamabad for the data when the Covid-19 pandemic broke out and Pakistan was completely shut down. The Bureau of Statistics was exceptionally kind and cooperative. No help from the PPAF could be received due to procedures and time constraints, which was a limitation in designing the research methodology. During a short break in the lockdown, the fieldwork was conducted over 23–31 May 2020, and the methodology and data collection tools were modified and restricted to key informant interviews and FGDs with semi-structured interviews.

To gather data from the field in the short period of nine days, two target populations were identified: minority community leaders and office bearers of LSOs that were set up during the project implementation period. In each district, the team first conducted the key informant interviews and FGDs with minority communities and then interviews/FGDs with TTO members/office bearers.

The first and second research questions are related to religious minorities, which are concealed populations. To answer these questions, persons from our existing contacts in the selected districts were identified. A total of ten individuals were key informants: five of them were Christian, four Hindu and one Muslim. Only one of them was a woman and all of them were politically or socially active in their communities. The non-Muslim key informant interviewee was a journalist closely connected with the Hindu community in Ghotki district.

Based on the data provided in key informant interviews, issues were clarified. These interviewees helped the team understand the dynamics of Christian and Hindu populations living in five districts: Muzaffargarh, Bahawalpur, Ghotki, Sanghar and Layyah. Apart from providing essential information, the key informant interviewees helped identify minority

neighbourhoods and important people in these areas for FGDs. A total of ten FGDs were designed with 6–10 people in the five districts. However, in two FGDs, held in Bahawalpur, the number of participants unexpectedly increased to 30 in one meeting and to 150 in another, which is why the discussions were more in the form of people speaking in front of an audience than FGDs. The FGDs were held in minority neighbourhood settings and women's participation varied from 40 per cent to 60 per cent on average. The following queries were framed for them:

- Do Christians/Hindus/minorities live in segregated residential areas?
- If yes, then are these neighbourhoods regular or illegal settlements?
- What basic amenities, such as clean water, sanitation and electricity are available in these neighbourhoods?
- What is the livelihood of the minorities residing in the district in general; and if there are minority neighbourhoods, then what do most of their men and women do for their livelihood?
- If there are minority neighbourhoods, then are they provided any uplift support in the shape of microcredit, skill training, asset transfer or construction of infrastructure by the government, church or any non-governmental organisation (NGO) (the type of activities done under PPAF-III)?
- Do they know about the PPAF and the work done by it in their district?

In order to collect data to answer the third and fourth research questions related to the work done by the PPAF, a total of ten FGDs were conducted with TTO members and/or office bearers. In the process of identifying the TTO members and/or office bearers and arranging an FGD with them, several NGO members, local politicians and social workers from the area helped the research team. The size defined for the FGDs was 6–10 persons. In Bahawalpur, the size could not be maintained because in three meetings only 1–2 TTO officer bearers took part. In Sanghar district, the number of TTO members exceeded 15. In Punjab, FGD participants were mostly men. In Sindh, they were mostly women.

The following queries were framed for the FGDs:

- What was the year when the PPAF made the intervention in the UC for the first time?
- When were the structures of community organisation (CO), village organisation (VO) and LSO created in the UC?
- What activities were conducted under PPAF-III?
- What were the number and type of the beneficiaries and their selection criteria?
- What was the number of general body members and executive members in the CO, VO and LSO?
- What was the number of women, people with disabilities, and non-Muslims in the CO, VO and LSO?
- Which is the nearest minority neighbourhood in the case that no religious minorities existed in the UC?
- What is the overall impact of PPAF-III in the UC?
- Is the TTO still functional?

#### 4.1 Selection of districts for the research

Several considerations were taken into account for the selection of provinces and districts. The security situation, travel restrictions during the Covid-19 outbreak, and the demography of minorities in the districts identified in PPAF assessment reports were major factors in choosing provinces and districts for conducting the inquiry. Balochistan and Khyber Pakhtunkhwa provinces have relatively small numbers of minorities. Balochistan was also left out because of the security situation in the province. In Khyber Pakhtunkhwa, the PPAF worked with the Kalash community, 'an indigenous minority, [that] practices an ancient religion', number about 4,000 (PPAF 2017: 7), and who are now celebrated. The PPAF prepared an Indigenous Peoples Planning Framework to work with this small community (PPAF 2015: 17), as an indigenous community and not as a religious minority. Hence, this work does not help us ascertain if the project put an overall mechanism in place for the inclusion of religious minorities. With these limitations, we decided to focus on the broader picture, while selecting districts in Punjab and Sindh provinces, which have the largest number of Christians and Hindus: Christians are mainly located in Punjab and Hindus in Sindh.

The selection of districts in the two provinces chosen was also an uphill task. There are 154 districts in Pakistan. PPAF-III initially envisioned implementing the project in 119 districts but later contained itself to 101 districts (PPAF 2016: 6). The declassified PPAF-III project proposal documents do not name the districts or UCs where the project was to be implemented. We relied on project assessment reports, produced during and at the end of the project, to identify districts and UCs. These reports name only selected districts and UCs where project assessment was done.

From the identified districts, we did not want to go to Umarkot and Tharparkar where Hindus only account for about 50 per cent of the total population of the districts. Religious harmony is strangely very high in these districts (Raza 2015). The inclusion of these districts in the programme resulted because of extreme poverty, as the PPAF's own district preference shows. Inclusion of minorities in a district where they account for half of the total population does not help us understand if the project ensured their overall inclusion; hence, these districts were dropped.

With these considerations, in Punjab Layyah, Bahawalpur and Muzaffargarh districts were chosen because sizeable Hindu and Christian populations live there; and they also fall within the PPAF-III programme and are identified in project assessment and audit reports. In Sindh, Ghotki and Sanghar, districts were chosen where Hindus are the main minority population, but a small number of Christians also live there. For the identification of UCs in these districts, again the PPAF assessment and audit reports were used.

### 5 Researcher's positionality

The lead researcher may not come from the same socioeconomic class, but shares the same Punjabi Christian background on his mother's side. Although positioned as an insider, his childhood was not in a Christian neighbourhood and his paternal side is not Punjabi. He is among the very few members of the Christian community who come from an Urdu-speaking background. This unique position provided him an opportunity

to closely monitor caste and culture from an outsider's perspective. At the same time, the researcher shares several of the challenges at personal and social levels that the rest of the Punjabi Christian community face.

## 6 PPAF-III explained

World poverty dropped from 37.1 per cent in 1990 to 9.6 per cent with the shift in development organisations' agenda in 2015 from the MDGs to the SDGs (World Bank 2016a: 4). The World Bank estimates that poverty has steadily been decreasing for the past 25 years but 'for the first time in a generation, the quest to end poverty has suffered its worst setback' due to Covid-19, conflict, and climate change (World Bank 2020b), which means life will be harder for most marginalised sections of society; hence, it requires more than ever looking at marginalised groups during the Covid-19 pandemic.

The World Bank has a long-term commitment to helping Pakistan achieve development objectives of 'education, energy and its support for rural infrastructure, and its engagement in policy dialogues' (World Bank 2013b). The World Bank, which aims to 'end extreme poverty and promote shared prosperity' (World Bank 2020b), established the PPAF in collaboration with the Government of Pakistan in 1999 as an autonomous company. Its first two projects were PPAF-I, which ran from August 1999 to December 2004, and PPAF-II, which ran from December 2006 to June 2011. The World Bank from 2000 to 2013 provided US\$885m, mainly through the PPAF, to alleviate extreme poverty. Because of this substantial support, the poverty headcount measured using the national poverty line fell from 64.3 per cent in 2001 to 24.3 per cent in 2015 in Pakistan (Redaelli 2020).

From June 2009 to September 2015,<sup>8</sup> the PPAF implemented its third megaproject, PPAF-III, worth US\$250m.<sup>9</sup> The project benefited approximately 10 million marginalised and vulnerable people, half of them women (World Bank 2014a). It provided microcredit, built community infrastructure, supported health and education schemes, and strengthened social mobilisation and livelihoods. About 350,000 beneficiaries received microcredit; 125,000 children were enrolled in 896 supported schools; 6.5 million patients received treatment; and 407,700 were trained in different skills. The scale of the work was achieved by dividing the project into five components, which are described in the following section.

### 6.1 The five components of the project

Component 1 – Social mobilisation and institution building (US\$38.5m)

In this component, the PPAF worked through partner organisations (POs) and set up TTOs at UC level. The province is the largest administrative unit of the federation of Pakistan. There are four provinces in Pakistan – Balochistan, Khyber Pakhtunkhwa, Punjab and Sindh – and the federal territory of Islamabad. Each province is divided into divisions, which are further composed of several districts. In each district there are several towns, which are called *tehsil* in Punjab and *taluka* in Sindh. The *tehsil/taluka* are further divided into UCs, the smallest administrative unit.

Roughly, a UC is composed of dozens of villages in rural settings. Often, individuals and families in a village prefer to live in their own communities, which is why a residential area in village is often divided based on caste or

kinship. The POs created the first-level organisation at community level, namely COs. Then VO were created at village level. Two members from each VO formed an LSO at the UC level.

The objective of the inclusive COs was to empower the poor by creating networks at the UC level. The design approach was to build synergy with POs that created platforms for rural people to access ‘financing, skills, infrastructure, health, education, development of their own communities, and for interaction with government’ (World Bank 2016c) and act as an effective ‘interface with local government bodies, other development programs and markets’ (World Bank 2009b).

The PPAF’s POs worked with COs to identify the poor and the ultra-poor and ‘incubate community institutions which demonstrate a potential to grow through sequential steps corresponding to the lifecycle’ and performance of the COs, VO, and LSOs (World Bank 2009b). The expected outcome was that ‘inclusive COs of the poor’ formed and their clusters mobilised ‘to manage their own development, and access services through improved linkages to local government, other development programs and markets for sustainable service delivery’ (World Bank 2009b).

After the COs, VO and LSOs had been created, the National Poverty Score Card with 13 questions was used to assess the poverty level of households at the UC level.

Table 8.3 shows the poverty score range matrix.

Component 2 – Livelihood enhancement and protection (US\$85.3m)  
 This component was intended to improve ‘the capacity, opportunities, assets and productivity of community members to reduce their vulnerability to shocks, improve their livelihoods initiatives and strengthen their business operations’ (World Bank 2009a: 2).

**Table 8.3 Poverty score card**

Category of poor	Subdivision	Score range	Project intervention
Absolute poor	Extremely poor/ultra-poor	0–11	1 Asset transfer
	Chronically poor	12–18	2 Skill training
	Transitory poor	19–23	
Transitory poor	Transitory vulnerable	24–34	1 Microcredit 2 Skill training 3 Sometimes asset transfer
	Transitory non-poor	35–50	1 Training
Non-poor	Non-poor	51–100	2 Sometimes microcredit

Source: Author’s own, based on PPAF (2018).

### Component 3 – Microcredit access (US\$40m)

The objective of this component was to improve the access ‘of the poor to micro-finance to enhance their capacities, productivity and returns from livelihood initiatives’ (*ibid.*: 6).

### Component 4 – Basic services and infrastructure (US\$80m)

The objective of this component was to improve basic infrastructure, such as irrigation channels, and existing health and education facilities in villages and UCs.

### Component 5 – Project implementation support (US\$6.2m)

This was for project implementation, monitoring and evaluation.

The project’s development objective was to ensure that the ‘targeted poor are empowered with increased incomes, improved productive capacity and access to services to achieve sustainable livelihoods’ (World Bank 2009a: 2). The outcome indicators set by the World Bank were:

- Community institutions that are inclusive, viable and sustainable.
- An increase in household assets and/or incomes.
- Improved access to municipal and local services.

(World Bank 2009a: 7)

According to the PPAF, it initiated work on vulnerable groups after an earthquake devastated many parts of Pakistan in 2005. Inclusivity, it claims, is among the PPAF’s core values and includes religious minorities: ‘Recognizing demographic diversity – women, children, elderly, persons with disabilities, indigenous groups and religious minorities – and connecting different views, experiences, issues and vulnerabilities as a methodology to reducing poverty’ (PPAF 2020).

In line with this aspiration, the World Bank Project Appraisal Document of PPAF-III notes that the ‘key aim of PPAF is provision of livelihood support, productive services and facilities in an inclusive manner to ultra-poor and poor, particularly to women, youth, disabled and minority groups who are at a disadvantage’ (World Bank 2009a: 22). The project proposal recognises religious minorities as ‘ultra-poor’ and includes them among vulnerable groups (*ibid.*: 23):

- Widows having no male child over the age of 18.
- Women with disabled husbands.
- Divorced/abandoned/women/unmarried women who are no longer of marriageable age and are dependent on others.
- Disabled people (physically or mentally).
- Unaccompanied minors (i.e. orphans and abandoned children).
- Unaccompanied elders (over the age of 60).
- Landless people.
- Minorities.

In this context, the 65,400 COs and 5,600 VOs were created in 380 UCs across the country. One of the expectations of the POs was that the project proposal mentioned was ‘Mobilizing community groups including

**Table 8.4 PPAF-III components and budget allocation**

Serial	Component	Amount (US\$)	Nature of expenditure
1.	Social mobilisation	38,500,000	<ul style="list-style-type: none"> <li>• Incubating TTOs at neighbourhood, village and UC levels</li> <li>• Through these organisations, identifying the poor and ultra-poor using the poverty score card and then implementing the entire project</li> </ul>
2.	Livelihood enhancement and protection	85,500,000	<ul style="list-style-type: none"> <li>• Identifying and supporting innovative microenterprises</li> <li>• Facilitating and promoting linkages with private and public sectors</li> <li>• Supporting community members to build up their savings capacity</li> </ul>
3.	Microcredit access	40,000,000	<ul style="list-style-type: none"> <li>• Improving access of the poor to microfinance to enhance their capacities, productivity and returns from livelihood initiatives</li> </ul>
4.	Basic services and infrastructure	80,000,000	<ul style="list-style-type: none"> <li>• Establishing and upgrading basic services and infrastructure to serve the poor, including improved health and education facilities</li> </ul>
5.	Project implementation support	6,000,000	<ul style="list-style-type: none"> <li>• Facilitating governance, implementation, coordination, monitoring and evaluation, learning and quality enhancement efforts in the project</li> </ul>

Source: Author’s own, based on information compiled from various PPAF documents.

women, youth, disabled, minorities, marginalised etc. and training them in skill enhancement, marketing, etc.’ (World Bank 2009a: 13). But, no PPAF report showed if any policy was in place to make this happen. The *Directors’ Report* for the year 2016 noted that:

A key achievement of PPAF III has been the inclusion of the ultra-poor, women, youth and persons of disability through this component. This was achieved through proactive policies, use of quotas and utilisation of a monitoring system that collected data disaggregated by gender, age and poverty scores for active course correction. (World Bank 2016b: 9)

The Project Implementation Completion and Results Report notes that: ‘Furthermore, the project ensured the inclusion of women, youth and persons with disabilities through specific quotas and targeted activities’ (World Bank 2017: 51). Hence, neither report mentions that any PPAF policy measures were put in place for religious minorities.

It is also important that religious minorities live in their own neighbourhoods, which are often irregular or illegal settlements. Apart from

Ahmadis and Baha'is, the religious minorities racially and often ethnically stand apart from other people. Because this scheme of things excludes minorities, it may have barred the PPAF from achieving one of its higher objectives: 'better identification of and responsive program interventions for ultra-poor' (World Bank 2017: 6). The final PPAF report, titled *User/Beneficiary Assessment Survey, Phase-II*, states that PPAF-III could not work with the ultra-poor, the category religious minorities fall into. The report notes that: 'Overall loans and grants are skewed towards the transitory vulnerable, transitory non-poor, and non-poor' (Apex Consulting 2015: 10).

## 7 Research findings

The five districts – Muzaffargarh, Bahawalpur, Ghotki, Sanghar and Layyah – are rural, with populations ranging between 1.5 million and 5 million. They vary in size, language, ethnic composition, religious harmony and political administration. On average, each district has 73 UCs and the PPAF chose 2–6 UCs in each district. During the research, the team went to 12 UCs in the five districts where the intervention was implemented under PPAF-III. The mean population in each UC is 40,000 people.

It was found that in most of these districts, the PPAF had already conducted several microcredit projects. In PPAF-III, the main areas of focus were capacity building through skill training and asset transfer, microcredit and infrastructure construction. The work of the PPAF was significantly observable in the UCs of the five districts where the intervention was implemented. In those UCs, youth centres were set up where young people were given skill training in motorcycle, refrigerator and cell phone repair, and fashion design and sewing skills. The required tool kit was also provided so that they could start their own business. Others received cows, sheep, goods for starting a grocery shop and so on.

Those who received training in rearing livestock were provided a buffalo or a cow. At the women's skill centre, women were trained in making handbags, detergents and how to sew. A digital hub was also set up with a computer and an internet connection for email and web browsing facilities. A photocopier was also placed in the hub. In Bahawalpur, we came to know that in the absence of the photocopier machine, people had to travel 8km (5 miles) to get a page photocopied. People with disabilities were given skill training and devices such as wheelchairs, glasses and artificial limbs. To improve infrastructure, streets were brick-lined, school buildings were renovated and crossings over watercourses were built. Lastly, a number of persons were provided microfinance to start a small business.

### 7.1 Socioeconomic conditions of Christians and scheduled-caste Hindus in the five districts

The population of religious minorities in the five districts ranges between 1 per cent and 26 per cent. In all five districts, the team first went to minority neighbourhoods and later to the UCs where the PPAF had implemented the project. Christians, because of their association with sanitation work, were undervalued. They were so despised that in some instances, the scheduled-caste Hindus also did not like to associate with them.

In Ghotki, when asked which community or caste was working in sanitation labour, we were told they were ‘Christians’, meaning sanitation worker and Christian are synonymous for them. In Mirpur Mathelo town, a major industrial hub, 34-year-old Muhammad Musa, a journalist working for a Sindhi language newspaper, was our team guide: “There are Muslim sanitation workers here, too. However, we generally call sanitation workers “Christian”.<sup>10</sup> It seems the Christian identity was confused with the abhorred sweeper/sanitation worker occupational identity as it is in many other parts of the country.

One common theme about Christians in all districts was that they were either children or grandchildren of those who had migrated from central Punjab after the creation of Pakistan. They are still unsettled; living in a decent house and doing a decent job are a dream for these hundreds of thousands of Christians who mostly live in temporary settlements. For example, there are four Christian neighbourhoods in Bahawalpur city. One was founded by the Catholic Church, while the other three are illegal settlements, having no clean water supply, no paved streets, no streetlights and no sewer systems.

Katchi Abadi (which literally means ‘illegal settlement’), one of the four settlements, has 550 houses. Almost all the men there are sanitation labourers and the women work as domestic help. ‘They provide sanitation to others but themselves are deprived of it. As there is no drainage of sewage, residents often quarrel over the drainage of sewage. The tap water because of the broken and rusty pipelines gets mixed with sewage,’<sup>11</sup> said 40-year-old Lazar Allah Rakha, a human rights lawyer from the Christian community in Bahawalpur. ‘Life for these residents is like drinking your own pee.’

A similar situation among Christians was observed in Sanghar district where the team went to Padri Jo Goth village. Rasheed Masih, a 28-year-old social worker, told the team that the village was without sanitation facilities. ‘People treat Christians as untouchables and migration to Karachi is the only option for getting rid of poverty.’<sup>12</sup> He said that some of their youths have opted for nursing but mostly were working as unskilled labourers in the Muslim landlords’ fields, while some were sanitation labourers in the nearby city.

Obtaining education without financial resources and with the sanitation stigma is an uphill task for Christian children. Rasheed Masih said that girls are more interested in education than boys. Lazar Allah Rakha himself has struggled through this hardship and believes that hatred is the root cause. ‘Other students in school hate to sit, eat, drink or shake hands with you and then call you names: “*chuhra*” [sweeper]. How can you survive and excel in education in this hostile setting?’, He asked. ‘Even those who attain intermediate level education are only offered jobs in sanitation and the lucky ones who manage to get a better job are called by their co-workers “*chuhra*” to degrade them and convey that they don’t deserve to be here.’<sup>13</sup>

In the Punjab districts, only scheduled-caste Hindus were present, but in Sindh the Hindus were divided into upper-caste and scheduled-caste Hindus by their literacy rate, geography, means of livelihood, landownership, availability of worship places and political participation. Scheduled-caste Hindus were located in rural areas. They were mostly

illiterate and landless, worshipping at home rather than a place of worship, and working as peasants on the fields of Muslim landlords. These peasants have no choice who they can vote for and only follow the instructions of their landlord.

Upper-caste Hindus were located in urban areas. They were educated and worked in business. In Ghotki, they are known as *dewan* and in Sanghar as *thakur*, both titles of huge respect. In Mirpur Mathelo, Dr Darshan was elected to a minority seat in the National Assembly. He is a medical doctor, but runs several businesses apart from being involved in politics. ‘Almost all major businesses in the district are owned by the *dewans*,’<sup>14</sup> Muhammad Musa told the team. He was of the view that Muslims could be divided into local Muslims and those who migrated to Pakistan after 1947 and were identified as ‘*muhajir*’ or migrants. ‘We, the local Muslims, are not interested in business while the migrant Muslims have been in competition with the *dewan* Hindus, which is why religious tensions have been on the rise in the district.’<sup>15</sup>

In recent years, Ghotki has become a flashpoint for religious conflict. Islamist cleric and political figure Mian Abdul Haq, custodian of the Bharchundi Sharif shrine and commonly known as ‘Mian Mithu’, is infamously associated with forced conversion of minority women in Sindh province (*Naya Daur* 2019). Mob violence in the name of religious or blasphemy laws is a phenomenon of Punjab province. In September 2019, mobs ransacked three Hindu temples and several shops on the pretext of blasphemy in Ghotki (Shahid 2019). In another such incident, in 2016, 17-year-old *dewan* Satish Kumar and his friend Avinash were shot at on the pretext of blasphemy. Kumar later succumbed to his injuries, while Avinash survived (Samoon 2016).

The *meghwarhs* in Ghotki are one scheduled-caste community that in the past 20 years has excelled and defied all bondage. They are located in urban areas, obtaining an education and working in business. In Mirpur Mathelo, the team met with Seeru Ram who is the head of the *meghwarh* community in Ghotki. Seeru Ram is also chief priest in the Sain Malang Baba temple. He was exceptionally hospitable, presenting traditional gifts to the team and taking them to the temple to pay homage. The annual festival draws thousands of Muslims and non-Muslims alike. When returning to his house, the team wanted to meet a few Christians – or, more appropriately, sanitation workers – on the way. Seeru Ram was reluctant and found it somewhat below his dignity. So, he went his way and the team its way. After meeting some Christians, we reached Seeru Ram’s house. ‘About 90 per cent of our community lives in cities, owns houses and is in [the] cloth business, as my sons are,’<sup>16</sup> Seeru Ram told us and it seemed as if different economic status was the guiding principle as to whether they could meet Christians.

Scheduled-caste Hindus from *bheel* and *kohli* communities are *haris* (landless bonded peasants). There are no upper-caste Hindu *haris*. The overall landlessness among scheduled castes is most obvious and at its worst in Bahawalpur. Around 200,000 of their population live in the town of Yazman. Landlessness, drinking water and conversion of their minor girls were reported as their major challenges. While the team was in Yazman, about 15km (9 miles) away, the shanties of scheduled-caste *bohria* were being demolished in 51/DB.

‘Once our people make an area habitable and cultivatable, powerful people, using the state machinery, snatch the place,’<sup>17</sup> 47-year-old Sham Lal told the team as he accompanied them in Bahawalpur. ‘The *bohria* are a wandering tribe struggling to settle down. They hunt boar, porcupine and the Indian spiny-tailed lizard for food, while their women raise livestock.’ It is a long time that Sham Lal has been working for the water and land rights of scheduled castes in Yazman. There are at least 50 government-approved scheduled-caste Hindu neighbourhoods across Yazman. Strangely enough, they have all been named Jinnah Minority Colony by the government. ‘None of us have the ownership of the houses. In all these colonies, there is no drinkable water provided. We bring water from adjacent Muslim colonies.’<sup>18</sup>

The team visited more than a dozen minority neighbourhoods where they asked residents if they had received any assistance from NGOs. Padri Jo Goth in Sanghar and Yousaf Colony were set up by the Catholic Church. The residents of Islami Colony in Bahawalpur said that only Jamaat-e-Islami had provided them relief in the shape of electricity poles. Apart from this, no government, political party or civil society organisation had helped improve their living conditions.

Some of the settlements had been set up by the government but still lacked basic amenities. Kashif Masih, a 40-year-old resident of Christian Colony in Bahawalpur told the team that Christians came here after 1947 and started living on government land. ‘In [the] 1970s, late prime minister Zulfikar Ali Bhutto ordered to transfer the land to squatters and these people were given ownership rights. We get some support from local politicians but not from non-government organisations.’<sup>19</sup> None of the members of minority communities knew about the PPAF work in their district in any of the five districts visited.

## 7.2 Selection of UCs and inclusion of minorities

The census data shows that religious minorities are present in all five districts the team visited. As their condition shows, they are in need of a PPAF-III-type intervention to disrupt the vicious poverty web they are stuck in. However, during our visit of minority neighbourhoods we found that minorities were not present in all UCs. It was also revealed in interviews with LSO office bearers that several UCs did not have minority communities. Most of the UCs were where the PPAF had worked before implementing PPAF-III. If the PPAF did not choose new UCs that included religious minorities, then at least a certain number of minorities from nearby UCs could be added.

For instance, the PPAF worked in Khanpur UC in Ghotki, but there are reportedly no minorities there. Next to Khanpur UC is Mithri UC, where the team met with Shish Paal, who belongs to the *bheel* scheduled caste. Shish Paal told the team that there were 25 houses from the *bheel* community in the UC. ‘All of us work in the fields of Muslim landlords as peasants. We are treated as untouchables and people usually keep a distance from us. Our children only get education to the primary level.’<sup>20</sup> For worship, these families meet at someone’s home. Shish Paal confirmed that the PPAF had not involved any of their members in any development project.

### 7.3 Inclusion of minorities as beneficiaries and in TTOs

Overall, inclusion of disability and gender were visible themes in the project's implementation. Most of the LSOs had at least 40 per cent representation of women. Apart from executive body members, beneficiaries were largely women. But sometimes these arrangements only appear to be cosmetic. For example, in Muradpur Jhandani UC, in Bahawalpur district, the LSO had 20 members, with only one male among them, who was the president, while the women members were only there to showcase the percentage of their representation, not to participate. In Khanpur UC, in Ghotki district, there was another way of dealing with mixing gender. All LSO members were women, which meant that men were excluded from the implementation plan. But this did not mean that women were the ones who were in charge. When the team met with the three office bearers, two of them had their husbands accompanying them.

People with disabilities were also given special attention in the project design. Most of the UCs implemented the livelihood enhancement and protection component. Under this initiative, the ultra-poor and others were provided skill training and related toolkits worth 50,000 Pakistani rupees (c.US\$300). In this component, people with disabilities were beneficiaries in large numbers. Hundreds of them also received devices such as hearing aids, glasses, artificial limbs and wheelchairs. However, the PPAF studied the participation of people with disabilities in organisational structures and found that 'only 7 per cent of TTO[s] across the country have at least one member with disability in their Executive Body' (Khalid *et al.* 2019), which shows that their inclusion at beneficiary level was ensured, but not at decision-making level.

In the overall research, it was found that religious minorities were not among the beneficiaries, nor were they part of the TTO structure. It was particularly evident in the districts where their population was 1–2 per cent. For example, the minority population in Bahawalpur is about 2 per cent. In this district, Marhi Sheikh Shijra UC is still in effect functioning despite the project having closed five years ago. Out of 20 LSO members, 18 were women and 2 were men, one of whom had a disability, but there was no member from the minority population. An interview with 42-year-old LSO President Muhammad Saleem revealed that there were around 1,000 people from the minority community in the UC, mainly scheduled-caste Hindus. Muhammad Saleem said that, 'these people are the poorest of the poor in our UC. People do not like to associate, shake hands, eat or drink with them'.<sup>21</sup> It was also not obvious if any of the minority persons were among the beneficiaries.

The population of non-Muslims is about 7 per cent in Ghotki. In Khanpur UC, inclusion of religious minorities in the project was considered unacceptable. The team met with LSO President Khanzadi, Vice-President Mai Halima and general body member Shahnaz Bibi. When asked if religious minorities were included in the project, Shahnaz strongly responded they could not be included. For a second there was pin-drop silence after her statement. Realising that it was an embarrassing situation, Khanzadi intervened and said that there were no minorities living in the UC. But Shahnaz again jumped in and said that: 'Even if there were minorities, we would not have included them.'<sup>22</sup> It showed us that they were

not sensitised overall on the inclusion of marginalised sections of society and they, as women, were suffering the same exclusion. In our interviews in another UC, Bhaitoor, the LSO office bearers said that there was one general body member from the minority community in the LSO, but they could not provide more information (their name, etc.) about the member beyond this claim.

Sanghar was the only district where we could visibly see minorities included from the beneficiary level to the decision-making level in the TTOs. The overall population of religious minorities is around 26 per cent in Sanghar. This level of inclusion could be partially because of their high population rate, but also because of the implementation PO's inclusive approach. The PPAF's project implementation PO in Sanghar was the Sindh Agricultural Forestry Workers and Coordinating Organisation (SAFWCO). A presentation on the project implementation at the SAFWCO office revealed that the organisation was sensitive towards minorities.

During the visit to Piru Faqir Shoro UC and Hoat Wassan UC a complaint box was observed, which was not seen in any of the LSO offices in the other four districts. Also, a chart of the government's UC development plan was placed on the wall and activities were aligned with those of the government. Among many other things, during the project cycle, the LSO office bearers got several scheduled-caste villages registered with the government. Without this registration, a village does not get official recognition or any financial or other support from the government; and is not included in any development plan.

The five members of the general body of the Hoat Wassan LSO were scheduled-caste Hindus, as were the LSO general secretary, Naichal, and the member of the general body, Gian Chand, in Piru Faqir Shoro. The Sindhi scheduled-caste Hindus were quite comfortable with the presence of the research team, despite linguistic and religious differences. A scheduled-caste Hindu participant, who could not be identified by name, in a TTO in Piru Faqir Shoro said, 'I feel the fragrance of the team as of my own' (an expression which meant that he felt we belonged to him).<sup>23</sup>

## 8 Conclusion

The goal of inclusive societies cannot be reached without considering religion as an important marker of social exclusion, especially in countries such as Pakistan. The research shows that religious minorities were evidently sidelined in the development process and World Bank staff either did not notice it or were unwilling to achieve the project indicator.

This study necessitates that the multi-layered marginality of certain religious minorities be recognised. All non-Muslims, in general, suffer social and political exclusion to a certain degree, but the severity of social exclusion dramatically increase if it is coupled with caste, disabilities, poverty and stereotypical stigmas.

Caste, a marker of exclusion and group formation, is one of the least researched aspects in Pakistani academic circles and so is missing from development programmes. Having existed for millennia on the Indian subcontinent, it is impossible to imagine that caste is non-existent in the country, as Pakistan's official policy states. Dalit caste status contributes to poorer socioeconomic status, which is why Christians and scheduled-

caste Hindus are treated as untouchables, pushed into ghettos from rural to urban settings, refused commensality and only offered jobs in sanitation. This requires the PPAF to work especially with these communities, who face multi-layered exclusion.

The PPAF staff and the implementing POs were clearheaded about women and people with disabilities but not about religious minorities. The people with disabilities were also well taken care and quota systems were in place for women and the people with disabilities. However, no such mechanism was put in place for religious minorities. There was no obvious minority participation except in Sanghar, which shows that the PPAF and the POs did ensure the minority participation, despite being identified as a vulnerable group in the project proposal.

Keeping in view the high level of religiosity in the country and crippling intersecting marginalities of religious minorities, including Christians and scheduled-caste Hindus, the project implementers of the World Bank, the PPAF and POs should have adopted robust policies and mechanisms for their inclusion. Because the inclusion of minorities did not happen, it is necessary to conduct an audit of the PPAF and the implementing POs to see if an adequate representation of religious minorities is present on their boards and among their staff members. If the PPAF and partners do not allow inclusion of minorities among their own rank and file, then expecting them to make village networks inclusive of minorities is not realistic.

International aid agencies that provide help also should not shy away from building robust mechanisms to better include religious minorities in their societies. The monitoring World Bank team should have rectified this project implementation flaw at the time instead of allowing it to continue. As religious minorities are ignored in countries such as Pakistan, it is also the responsibility of international aid agencies to put in place policies that do not allow them to be ignored as the PPAF was able to ignore them throughout the project cycle.

## **9 Recommendations**

- 1 Religious minorities are not a homogenous group. In terms of social exclusion, they widely differ in marginality and extreme poverty. The poorest religious minorities must be taken care of so that no one is left behind.
- 2 Article 36 of the Constitution of the Islamic Republic of Pakistan states that: '[The] State shall safeguard the legitimate rights and interests of minorities, including their due representation in the Federal and Provincial services.' As an autonomous body working on the behalf of the Pakistani people, the PPAF must ensure religious minority representation so that real inclusivity starts from within.
- 3 Board members and project staff of implementing POs and the PPAF should be scrutinised to check there is adequate representation of religious minorities. Without this, networks created by them cannot be inclusive and tolerant of minorities.
- 4 International development agencies such as the World Bank should also ensure that their own regional and country offices have adequate representation of minorities, so that partner organisations like the PPAF follow their lead.

- 5 Development practitioners and organisations need to be trained on social exclusion and the marginality of religious minorities at the lowest level of their respective organisations.
- 6 In the same way that the PPAF ran a special programme for 4,000 Kalash people, it should run an extensive programme for Christians and scheduled-caste Hindus living in urban ghettos, even if these minority pockets fall in the PPAF's low-priority urban areas.
- 7 One criterion for selection of districts and UCs should be the presence of a sizeable number of impoverished religious minorities. If they are not present, then minorities from adjacent UCs should have been involved.
- 8 To be on a safe side, a quota should be put in place for religious minorities that suffer social exclusion at multiple levels.

### Notes

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- † The World Bank was contacted for comment on this chapter but no response was received.
- 1 Asif Aqeel, journalist, researcher and activist, Pakistan.
- 2 Mary Gill, Executive Director, Center for Law & Justice, Pakistan.
- 3 There are three administrative tiers of government in Pakistan: federal, provincial and district. The district administration is divided into towns (*tehsil*), which are further divided into union councils. So, the UC is the lowest administrative unit of governance in Pakistan.
- 4 This statement was included as Article 26 in the *Interim Constitution of the Islamic Republic of Pakistan* (Government of Pakistan 1972: 8).
- 5 In the Indian caste system, food is ranked: 'vegetarianism is distinctly the highest; then come eggs, fish, chicken, mutton, port, beef and, last of all, carrion'. The untouchable castes are those that eat beef, and even worse, carrion', wrote Belgian anthropologist Robert Deliège (Deliège 1999).
- 6 Contemporary scholars on Christians include, for example: Ali (2006), Gabriel (2008), Julius (2017) and Sookhdeo (2002).
- 7 The practice of eating together.
- 8 An additional six months were given to ensure completion of all activities.
- 9 An additional US\$5.8m was gained through the exchange rate.
- 10 Interview with Muhammad Musa, Ghotki, 29 May 2020.
- 11 Interview with Lazar Allah Rakha, Bahawalpur, 24 May 2020.
- 12 Interview with Rasheed Masih, Padri Jo Goth village, 25 May 2020.
- 13 Interview with Lazar Allah Rakha, Bahawalpur, 24 May 2020.
- 14 Interview with Muhammad Musa, Ghotki, 29 May 2020.
- 15 *Ibid.*
- 16 Interview with Seeru Ram, Mirpur Mathelo, 29 May 2020.
- 17 Interview with Sham Lal, Yazman, 24 May 2020.
- 18 *Ibid.*
- 19 Interview with Kashif Masih, Hasilpur town, 24 May 2020.
- 20 Interview with Shish Paal, Mithri UC, 29 May 2020.

- 21 Interview with Muhammad Saleem, Saddar town, 24 May 2020.  
 22 Interview with Shanaz Bibi, Khanpur UC, 25 May 2020.  
 23 Interview with anonymous participant, Piru Faqir Shoro, 25 May 2020.

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# Chapter 9

## Promoting FoRB in a Poverty Reduction Programme in Sudan<sup>\*†</sup>

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### 1 Introduction

The objective of this chapter is to examine how the Islamic Development Bank (IsDB) has engaged with implementing freedom of religion or belief (FoRB) into its poverty reduction interventions in South Kordofan and Blue Nile, as experienced by the populations of the two states, most of whom are members of non-Muslim minority groups. We look at how sensitive the Islamic Microfinance Poverty Reduction Programme is to religious inequalities faced by the local populations, based on their ethnic and religious identities.

The main research enquiry is guided by three questions:

- 1 What is the IsDB approach to the inclusion of FoRB in its poverty reduction development programme?
- 2 How is an Islamic Microfinance (IM) mechanism to reduce poverty responsive to religious differences and inequalities in South Kordofan and Blue Nile states?
- 3 What are the opportunities and challenges for integrating FoRB into this development programme?

This chapter does not intend to evaluate whether poverty has been reduced for minority religious populations in the two states as the result of implementation of the Poverty Reduction Programme (which in itself is an Islamic Sharia compliance micro funding programme), or how it contributes to wider efforts to reduce poverty for low-income individuals and households in South Kordofan and Blue Nile states.

We recognise that the notion of ‘poverty reduction’ within the development literature is debated and contested, and that it has been given different meanings over time. In the context of this case study, we use the term ‘poverty reduction’ as defined by the Sudanese government’s *National Strategy for Poverty Reduction 2013–2030*. Here poverty reduction refers to improving living conditions of poor people, through creating gainful employment, providing education, housing, and health services, which facilitate social and political participation. In this context poverty can be reduced, but it is impossible to alleviate it completely (Republic of Sudan 2018: 6).

The concept of IM adheres to the principles of Islam and is a form of socially responsible investment. The IsDB states that ‘there is a common

goal in Islamic principles and microfinance which is making people self-reliant, enterprising, productive and self-respecting' (2011: 3).

We use the term 'religion' to refer to faith and spirituality, and the term 'religious group' to mean a group of people who practise a particular set of religious beliefs or faiths. 'Religious places' refer to places where religious practices and ceremonies take place, such as mosques and churches.

The most widely used definition of FoRB in much of the literature is informed by Article 18 of the Universal Declaration of Human Rights:

Everyone has the right to freedom of thought, conscience and religion; this right includes freedom to change his religion or belief, and freedom, either alone or in community with others and in public or private, to manifest his religion or belief in teaching, practice, worship and observance.  
(UNGA 1948)

Barker, Bennett and Farr (2019) argue that a full account of religious freedom includes at least four main dimensions. First, the religious freedom of intellectual and spiritual inquiry. Second, the religious freedom of practical reasons. Third, the religious freedom of sociality, where all people should be free to speak and act to express their religious beliefs and to join with others of like mind and spirit. Fourth, the religious freedom of political and legal expression. Included here is the right to create and operate religious institutions such as schools, charitable organisations, hospitals, universities, and others. In sum, while religious freedom is not an absolute right, it is a capacious and presumptive right that should be firmly protected in law and respected in culture (*ibid.*: 40).

It can be argued that the fourth dimension of religious freedom as defined by Barker *et al.* is most relevant to the case of Sudan. The Islamic government of Sudan (1989–2019) undermined the religious freedom of non-Muslim groups by constituting that Islam is the main source of legislation. For example, public education is based on Islamic values and culture, with no account of other religions. Religious minority groups in Blue Nile and South Kordofan states are forced to be subjugated under Islamic law and culture, which led to political and armed conflict between 2008 and 2012. Therefore, religious discrimination by the Islamic government of Sudan has led to serious political and security instability, which contributes to increasing poverty in the two states (Ministry of Economy and Finance 2016: 14).

When referring to the populations of the two states as being religious minority groups, we refer to power differentials between the Islamic governing body of the country and the non-Muslim populations of the two states, who have felt marginalised because of their different religious or ethnic identities. Most of the people living in the two states are either Christians, atheists, or affiliate with indigenous religions and beliefs of African ethnical decent. The Sudan People's Liberation Movement (SPLM) argues that the 'population in Blue Nile State and South Kordofan suffer because of their intersecting identities, where their religious identity intersects with their African ethnic background identity, resulting in their political opposition to the political regime in the country' (*Alayam Newspaper* 2015: 3).

## 2 Methodology

A flexible research methodology was chosen to fit the complex purpose of the study. Published literature and previous research within the field of this case study is very limited, and therefore a combination of literature review and participatory field research was applied to collect the data needed.

The literature review covers official reports and documents of both IsDB and the Sudanese government. All the documents referred to in this study were obtained via the headquarters of IsDB in Saudi Arabia, and the Heads of the Ministry of Finance and National Economy, the Ministry of Social Welfare, and the Central Bank of Sudan in Khartoum. Also reviewed were relevant project reports concerning the two states where the project is implemented.

All direct planned interviews with key professionals involved in the project, both in Sudan and Saudi Arabia, had to be changed into Zoom and telephone interviews, due to the Covid-19 lockdown in the two countries, along with international restrictions on cross-country travel.

Key professionals at the policymaking level and project managers, both at the headquarters of IsDB and the Sudanese government, were interviewed to obtain key project information. These professionals were selected on the grounds of either their main roles in the policymaking of FoRB integration into development projects, or because of their project management roles at the headquarter or state level. The two project managers in the two states were also interviewed to obtain information about how FoRB is addressed at the project level.

We asked for samples of the project's beneficiaries and members of Interfaith Community Committees (ICCs), most of whom are religious and faith leaders, to answer questionnaires face to face (most are unable to read and write), and to respond to research questions that would indicate their perspectives of how the IsDB project has engaged with FoRB in the two states, and further to identify the main challenges the project faces in promoting FoRB. Focus group discussions (FGDs) and individual face-to-face interviews were also conducted.

Originally, we planned to interview 100 project beneficiaries in each state and 100 members within the ICCs, but this had to be reduced to 50 project beneficiaries and 160 members of ICCs, Local Interfaith Committees (LICs), and Interfaith Community Development Committees (ICDC) because of the restrictions on in-country travelling in Sudan due to Covid-19, and the application of social distancing principles. Security restrictions were further reasons for reducing the number of interviews.

The samples were chosen from the project beneficiaries and the ICC members in each state. They represent various religious and faith affiliations, and gender, ethnic, and tribal identities. The number of interviews for each social variable was decided according to the actual number of project beneficiaries in each state.

Two research assistants were trained on participatory research methods (via Zoom meetings) and a code of conduct was agreed upon to ensure that the participants could give free and genuine opinions during the interviews. The research assistants travelled to South Kordofan and Blue Nile states and conducted in-person group interviews. The researchers visited communities and religious venues used by the project to facilitate

**Table 9.1 Sample of project beneficiaries, and ICC, LIC, and ICDC members interviewed in Blue Nile state**

Project beneficiaries in Blue Nile state		ICC, LIC, and ICDC members in Blue Nile state	
Variable	Total number	Variable	Total number
<b>Gender</b>		<b>Gender</b>	
Female	30	Female	30
Male	20	Male	50
<b>Religious and faith affiliation</b>		<b>Religious and faith affiliation</b>	
Christian	15	Christian	22
Local religions and faith	25	Local religions and faith	20
Muslims	10	Muslims	28
		Others	10
<b>Ethnic and tribal identity</b>		<b>Ethnic and tribal identity</b>	
Arab	5	Arab	15
Hawsa	12	Hawsa	23
Ombraro	30	Falata	16
Others	3	Ombraro	20
		Others	6

community accessibility to microfinance, as part of applying ForB in the project delivery mechanism.

The main challenge faced during the field study was the travelling and movement restrictions resulting from the Covid-19 pandemic. In Sudan, government employees do not have access to work information from their homes, and this further delayed accessibility to project documents.

Poor electricity and internet supply in both states restricted communication, and therefore some of the interviews with the project managers had to be conducted by the two research assistants.

### 3 Background

#### 3.1 The Islamic Development Bank

The IsDB Group was established in 1974, as a multilateral development bank. It is a global development institution, headquartered in Jeddah, Saudi Arabia, with major hubs in Morocco, Malaysia, Kazakhstan, and Senegal, and gateway offices in Egypt, Turkey, Indonesia, Bangladesh, and Nigeria.

The IsDB Group has 57 member countries across four continents. The prime conditions for membership are that the prospective country should be a member of the Organisation of Islamic Cooperation, that it pays its

**Table 9.2 Sample of project beneficiaries, and ICC, LIC, and ICDC members interviewed in South Kordofan state**

Project beneficiaries in South Kordofan state		ICC, LIC, and ICDC members in South Kordofan state	
Variable	Total number	Variable	Total number
<b>Gender</b>		<b>Gender</b>	
Female	25	Female	18
Male	25	Male	62
<b>Religious and faith affiliation</b>		<b>Religious and faith affiliation</b>	
Atheists	6	Atheists	19
Christians	19	Christians	16
Local religions and faith	15	Local religions and faith	27
Muslims	10	Muslims	18
<b>Ethnic and tribal identity</b>		<b>Ethnic and tribal identity</b>	
Arab	9	Arab	25
Hawsa	13	Hawsa	12
Nuba	25	Nuba	35
Others	3	Others	8

first instalment of its minimum subscription to the Capital Stock of the IsDB, and that it accepts any terms and conditions that may be decided upon by the Board of Governors. IsDB is the global pillar within Islamic Finance with an AAA rating, and it has operating assets of more than US\$16bn and subscribed capital of US\$70bn (IsDB 2019: 7–8).

The IsDB is governed by a Board of Executive Directors (BED), which is responsible for the direction of the general operations and policies of the bank. The BED is currently composed of 18 members – nine Executive Directors appointed by their respective countries, which are the main shareholders, while nine others are elected by the governors of other countries. The term of office for members of the BED is a renewable period of three years (IsDB 2020).

In its 2017 annual report, the IsDB described its vision:

By the year 2030, the IsDB will have become a world class development bank, inspired by Islamic principles, that has significantly transformed the landscape of comprehensive human development in the Muslim world and helped restore its dignity. It states that its mission is, to promote comprehensive human development with a focus on priority

area of alleviating poverty, improving health, promoting education, improving governance and bringing prosperity to the people. (IsDB 2018: 5)

The President of IsDB stated during its 2019 annual meeting: ‘Achieving the Sustainable Development Goals is a crucial development priority for IsDB, as it is in line with Sharia principles of inclusive development and human rights principles’ (IsDB 2019: 7–8).

IsDB summarises its main five pillars of development activities as:

- 1 Building partnerships between governments, the private sector and civil society through public–private partnerships.
- 2 Adding value to the economies and societies of developing countries through increased skills and knowledge sharing.
- 3 Focusing on science, technology and innovation-led solutions to the world’s greatest development challenges through boosted connectivity and funding and a focus on the UN Sustainable Development Goals (SDGs).
- 4 Promoting global development that is underpinned by Sharia-compliant long-term sustainable and ethical financing structures as global leaders in Islamic Finance.
- 5 Fostering collaboration between our member’s nations in a uniquely non-political environment as we come together to focus on the betterment of humanity.

(IsDB 2019: 15–21)

The IsDB claims that its development intervention programmes are decided upon and initiated according to the development needs and priorities of the member countries, through a collaborative approach and in partnership with bilateral and multilateral development financing institutions, the private sector, and civil society. In this regard, the development interventions of the IsDB shift when they move from only offering services to Muslim communities to initiating development projects to benefit non-Muslims communities as well. It is also mentioned that the IsDB promotes FoRB in developing countries, and especially among the Muslim world (IsDB 2018: 5). A Sudanese scholar, Dr Yousif, who studied the work of the IsDB in Africa, links this shift to the Universal Declaration of Human Rights 1948. In responding to the declaration, the IsDB attempts to engage with partner communities from non-Muslim countries such as Uganda, South Sudan, and Ethiopia (Yousif 2016: 34–35).

In spite of its development work with non-Muslim communities, this study does not find any evidence that the IsDB has adopted a clear inclusive statement to promote FoRB in its mission statement.

### 3.2 Situating Sudan’s economic and political context

Sudan sits at the crossroads of sub-Saharan Africa and the Middle East and is bordered by seven countries and the Red Sea to the northeast.

Sudan has a population of approximately 36.2 million, of which two thirds are rural, holding abundant land and livestock, rich mineral resources extraction and a solid manufacturing base. Much of this potential has not

been realised due to ongoing conflicts and governance challenges. Despite these large endowments of natural resources and its agricultural potential, Sudan was ranked the fifth most hunger-stricken nation in the world by the Global Hunger Index in 2013. According to the Global Hunger Index in 2019, Sudan ranked 107th out of 117 qualifying countries.<sup>2</sup>

Since 1989, when the Islamic government took over in Sudan, a combination of economic and political instability has contributed to the Sudanese economy's crucial downturn and increased the poverty rate. The country has suffered from prolonged years of conflict, a volatile security situation, political transitions, an unsustainable debt burden, economic and financial sanctions, and fragile relations with the international community. All these aspects have severely constrained the country's broad-based growth prospects and poverty reduction efforts.

Sudan has further endured decades of civil war. However, in 2005, a peace agreement was signed (the Comprehensive Peace Agreement), which ended the conflict between the Sudanese government and the Sudan People's Liberation Army (SPLA). This resulted in a partition of Sudan into two countries – Sudan and South Sudan in 2011.

The armed conflicts in South Kordofan (2008–11) and Blue Nile (2011–13) states were between the Sudanese Armed Forces (SAF) and Sudan People's Liberation Movement–North (SPLM-N), a northern affiliate of the Sudan People's Liberation Movement (SPLM) in South Sudan, which claims religious and ethnic discrimination by the Sudanese government.

It is estimated that 5 million people have been displaced in Blue Nile and South Kordofan states due to the ongoing war and political turmoil between the Sudanese government and the SPLM (MoSWW&CA 2016b: 7).

The South's secession in 2005 led to the loss of the nation's oil revenues, which has had fundamental repercussions for Sudan, as evidenced by significant stresses in the macro-fiscal situation, the structure of the economy, and the political economy.

The external debt burden also remains a contentious issue. Sudan is a highly indebted country that has accumulated sizable arrears and the external debt burden weighs heavily on Sudan's development. As of end 2016, its public and publicly guaranteed debts stood at US\$45bn, of which about 85 per cent was arrears (CBOS 2018: 56).

US sanctions on Sudan affected its access to debt relief and consequently its access to concessional loans that are needed for infrastructure and basic services such as health, education, and food security. These sanctions also affect foreign direct investments, which could contribute to more employment opportunities. Remittances from Sudanese people abroad to their families, a fundamental informal safety net in Sudan, are also affected (MoSWW&CA 2015: 15).

The combination of economic and political instability has contributed to the Sudanese economy's downturn since the separation of the South in 2011. Sudan lost 75 per cent of its oil revenues due to this secession and the growth rate of the country's gross domestic product declined from 3.5 per cent in 2010 to -3.3 per cent and -10.1 per cent in 2013 and 2014, respectively (MoSWW&CA 2016a: 17).

This impacts on the livelihoods of many Sudanese, and the main constraints on rural livelihoods results in poor access to markets and lack

of access to financial services. 'In 2014, average rural poverty rates in Sudan are estimated at 58%, much higher than the national average and the urban poverty rate (47% and 27%, respectively)' (Republic of Sudan 2015: 16–17).

Long civil wars and internal armed conflicts since 2005, in Darfur, Blue Nile, and South Kordofan states are considered to be major factors contributing to unemployment and poverty in Sudan (Husein 2015: 15).

The government of Sudan considers promotion of economic growth, reduction of poverty, achieving the SDGs, and employment creation to be among the most important policy priorities and strategic pillars for the country's development. They are vital to addressing the challenges of high levels of poverty and unemployment, and an increase of inflation due to the secession of the South in 2011 (Republic of Sudan 2017: 19).

The Islamic government of Sudan (1989–2019) is known for its poor human rights record, and support of Islamic terrorism, which brought the country under economic and political sanctions by the international community. The government in power at the time of the study (2020) had a constitution that is based on the principle of Islam as the main source of legislation for the country.

The Interim National Constitution of the Republic of the Sudan, 2005 is the supreme law of the country. Article 1(1) defines the Nature of the State: 'The Republic of the Sudan is an independent, sovereign State. It is a democratic, decentralized, multi-cultural, multi-lingual, multi-racial, multi-ethnic, and multi-religious country where such diversities co-exist', while Article 1(3) states that 'The Sudan is an all embracing homeland where religions and cultures are sources of strength, harmony and inspiration' (Republic of Sudan 2005: 3).

Article 5 refers to Islamic law and consensus as being a source of legislation that is enacted at the national level. It says that the popular consensus and the values and customs of the Sudanese people, their traditions, and religious beliefs, which consider the diversity of the Sudan, are a source of legislation enacted at the national level (*ibid.*).

Article 6 of the Interim National Constitution highlights the Religious Rights as:

State shall respect the religious rights to:

- (a) worship or assemble in connection with any religion or belief and to establish and maintain places for these purposes,
- (b) establish and maintain appropriate charitable or humanitarian institutions,
- (c) acquire and possess movable and immovable property and make, acquire and use the necessary articles and materials related to the rites or customs of a religion or belief,
- (d) write, issue and disseminate religious publications,
- (e) teach religion or belief in places suitable for these purposes,
- (f) solicit and receive voluntary financial and other contributions from individuals, private and public institutions,
- (g) train, appoint, elect or designate by succession appropriate religious leaders called for by the requirements and standards of any religion or belief,

- (h) observe days of rest, celebrate holidays and ceremonies in accordance with the precepts of religious beliefs,
  - (i) communicate with individuals and communities in matters of religion and belief at national and international levels.
- (*ibid.*: 4–5)

The religious discrimination by the Sudanese government is the main reason behind the war in South Kordofan and Blue Nile states, and one can argue that the Sudanese government has violated FoRB through making Islam the main source of legislation and through governing the country via Islamic laws and policies, as discussed above (SPLM-N 2016: 10).

The practice of the Sudanese government (1989–2019) contradicts FoRB as expressed in international covenants such as the Universal Declaration of Human Rights and the United Nations (UN) Declaration on the Rights of Persons Belonging to National or Ethnic, Religious and Linguistic Minorities (1992), a UN General Assembly resolution that explicitly affirms the right of minority populations to religious freedom, including the free exercise of religion in the public space; Article 2 states:

- 1 Persons belonging to national or ethnic, religious and linguistic minorities (hereinafter referred to as persons belonging to minorities) have the right to enjoy their own culture, to profess and practise their own religion, and to use their own language, in private and in public, freely and without interference or any form of discrimination.
  - 2 Persons belonging to minorities have the right to participate effectively in cultural, religious, social, economic and public life.
- (UNGA 1992)

### 3.3 Blue Nile and South Kordofan states

South Kordofan is one of the 18 states of Sudan. It borders South Sudan and has an area of 158,355sq. km and an estimated population of 1.1 million people. The capital, Kaduqli, is centred on the Nuba Hills. Most of the South Kordofan population have a distinguished African ethnic identity and are from the Misseriya and Hawzma Arab tribes (nomadic), along with the Nuba communities (agriculturalist). Christianity is the predominant religion among the Nuba, while Islamic faith is followed by the Misseriya and Hawzma tribes.

It is estimated that half a million people were displaced during the civil war (2011–16), and that 65 per cent of the population are living below the poverty level (Ministry of Economy and Finance 2016: 17–18).

Blue Nile state borders South Sudan and Ethiopia. It has an area of 45,844sq. km, and an estimated population of two million people. The state is host to around 50 different ethnic and religious groups. Most of its population are from Hawsa and Ombraro tribes. Indigenous religions and faith are followed by most people, followed by Christianity, and then Islam. It is estimated that 60 per cent of the population are living below the poverty level (MoSWW&CA 2016c: 27).

The economic activity of both states is based on rainfed agriculture and livestock, but there is also increasing mineral exploitation. As a result of the war and armed conflicts with the government of Sudan, the two states

inherit a fragmented society with its social and religious elements shattered, and a devastated economy. As a post-conflict society, local religious and ethnic groups are left in pervasive ethnic, tribal, religious, and interfaith antagonism, mistrust, and hostility between the former adversaries.

Blue Nile state experienced an inflow of refugees from Ethiopia, and South Kordofan state received them from South Sudan. Refugees put even further economic pressure on residents and pressure on public services such as health and education. It is estimated that about five million people in the two states have suffered the impacts of war and armed conflict. The armed conflict in South Kordofan and Blue Nile states started in 2008 and continued until 2013, and it was between the SAF and the SPLM-N. The SPLM-N claims that the people of Blue Nile and South Kordofan states have sustained encroachments on their basic human rights, including FoRB, by the Islamic government, which called for religious and ethnic cleansing of the predominant non-Muslim and non-Arab ethnic communities. SPLM-N stated:

We fight against marginalization, religious discrimination and human rights abuse of the Islamic government directed at non-Muslims, and non-Arabic ethnic groups in the two states. We demand equal shares in the country's wealth, resources and in governance, and that the country should be run by a secular government and not Islamic one. (SPLM-N 2013: 2)

In both states it is difficult to distinguish ethnic identity from religious affiliated identity, as the two forms of social identity coincide in many aspects, and lead to religious discrimination by the government against the non-Muslim religious minority. Although religious minority groups have the freedom of practising religious worship, they are deprived of economic and political power. Dr Karsani, who has studied the causes and impacts of war in the two states, argues that '... in South Kordofan and Blue Nile state[s], the Arab and Muslim populations are minority groups, in numerical terms, but they are more powerful because they share religious and ethnic identity with the government in Khartoum' (Karsani 2016: 34).

### 3.4 Poverty reduction strategy in Sudan 2010–19

The Sudanese government developed a *National Strategy for Poverty Reduction* in 2013. The strategy is based on two integrated approaches. The first approach is the formulation of a macro-economic policy framework, to ensure the twin objectives of sustainable broad-based economic growth and poverty reduction. Pro-poor spending and structural change to the economy is promoted to ensure economic growth, which has been identified as the most powerful and effective way to reduce poverty, and to ensure economic stability. The aim is therefore to promote the sectors that facilitate growth and reduce poverty in a sustainable manner. With this macro-level approach,

pro-poor expenditure gives priority to: (i) Agriculture and Natural Resources; (ii) Infrastructure (roads and rail); (iii) Education; (iv) Health; (v) Water; and (vi) Social Protection. This definition of pro-poor expenditures follows four pillars of governance,

reintegration of Internally Displaced Persons (IDPs), human resource development, and economic growth promotion.  
(Ministry of Economy and Finance 2015: 13–14)

The second approach is direct poverty reduction, which targets the underprivileged and poor population in order to provide them with the necessary assistance to achieve improved health, education, and social wellbeing.

It is in this context that the government of Sudan developed its first IM development strategy in 2010. Since then, IM mechanisms have been promoted as a major initiative to reduce poverty and fight unemployment, especially in the rural areas. It is also a measure for resettlement in the war-affected states of South Kordofan and Blue Nile, and the Darfur region.

Dr Korenia, a senior strategic planner in Sudan and a development researcher from the University of Gazera, has criticised the *National Strategy for Poverty Reduction 2013–2030*. According to Dr Korenia, the strategy is ineffective and cannot achieve the economic growth and poverty reduction as described. The strategy does not tackle the root causes of political instability and armed conflict, all of which have resulted from uprisings of local populations against systematic marginalisation and religious discrimination of the three poorest regions in Sudan – Darfur, South Kordofan, and Blue Nile states (Korenia 2016: 13).

The main challenge to the poverty reduction strategy is that it promotes financial inclusion of the poor through Sharia-compliant microfinance. It does not take into consideration the religious and ethnic diversity of the poor population of Sudan and encroaches on basic human rights, and freedom of religion to the non-Muslim population. Dr Korenia argues that the strategy will not attract the international community's support, since it is based on religious principles. Sudan has had the worst human rights violation record since 1989 (Korenia 2016: 15).

### 3.5 Poverty reduction through Islamic Microfinance in Sudan

In Sudan, 46 per cent of the population is living in poverty and there is no formal social protection system in place to assist them. For many of the people living in poverty, financial inclusion and access to financial services and credit can make the difference between continued poverty or moving out of the poverty trap. They need access to financial services in order to turn around their negative livelihoods, to reduce vulnerability to shocks, as well as to access credit for business opportunities (Ministry of Economy and Finance 2015).

Microfinance is usually defined as the provision of financial services and products to poor people whose low economic standing excludes them from conventional financial institutions. Microfinance services are designed to meet the particular needs and social and economic circumstances of poor people. These include microcredit, small loans, savings, and certain forms of insurance. Access to each of these services is provided on a micro scale, allowing those with severely limited financial means to participate (Bakhtiar 2006: 14).

IM has been promoted in most developing countries with a Muslim majority population as a mechanism to ensure financial inclusion and to

contribute to poverty reduction. In 1990, the Sudanese government replaced the conventional finance and banking system in Sudan with an Islamic-based version. The government assumed that conventional microfinance services did not meet the needs of poor people, since it charges interest on loans provided to small and medium enterprises. In addition, a vast majority of the Muslim population refrain from availing themselves of conventional microfinance services due to the element of interest that is considered repugnant, or Haram, according to Sharia (Swar 2017: 5).

Derar (2015), in her study of an IM case in Sudan, explains that IM is based on four principles, which derive from the Sharia laws (Islamic jurisprudence) and are seen by many scholars as shaping the core of modern Islamic Finance: (i) the prohibition of interest; (ii) risk-sharing: lenders share in the profits and losses of the business they fund; (iii) calculations of the time value of money, which sheds light on the wisdom behind banning *riba*; (iv) the prohibition of *gharar* (meaning uncertainty or ambiguity created by the lack of information or control in an economic transaction) (Derar 2015: 18).

IM is becoming an increasingly popular mechanism for alleviating poverty in Muslim countries. IM adheres to the principles of Islam and is a form of socially responsible investment. Many economists argue that there is a common goal in Islam and microfinance, which can be summarised as making people self-reliant, enterprising, and self-respecting. In his study of the role of IM in poverty reduction in Bangladesh, Dhaoui (2015) suggests that practising microfinance in an Islamic way is a solution to achieve the target of poverty eradication. IM, which involves a Sharia-compliant way of financing and providing credit without collateral or any property for guarantee to the marginally poor, for their business, is one of the most popular tools employed as part of poverty reduction strategies. This approach is argued to be empowering and to increase the productivity of the poor, giving them social benefits in a sustainable way, and aiding economic development (Dhaoui 2015: 1).

In March 2007, the Sudanese government established the Islamic Microfinance Unit as a branch of the Central Bank of Sudan (CBOS) to develop a national strategy for IM to play a major role in poverty reduction interventions in the country. For more than a decade, the Islamic Microfinance Development Plan has developed to expand Islamic financial services through the establishment of institutions offering financial services. By 2014, the institutions of microfinance were well established, including the units within the CBOS headquarters, the Supreme Council for Microfinance, State Councils of Microfinance (micro finance policies and oversight), Sudan Microfinance Development Facility (an apex institution), Kafalat insurance (microfinance wholesale insurance), and Microfinance Planning Units at related ministries and microfinance institutions.

Despite the poverty reduction interventions through IM in Sudan, the effectiveness of the government's interventions has been widely criticised by many development researchers. In his study of microcredit as a strategy for poverty reduction in Sudan, Garoot Eissa (2013) describes the poverty reduction programme of the Sudanese government as lacking effectiveness. However, recently a more ambitious poverty-focused microcredit programme was laid forth, under which billions of dollars were earmarked

for microcredit to help the poor to obtain investible resources, which can be directed towards starting income-generating projects. Eissa argues that today, there is no shortage of funds earmarked for microfinance in Sudan. But the prevailing institutional inadequacies would not allow such substantial outlays to have much impact on poverty reduction (*ibid.*: 1).

In his study of the role of IM in poverty reduction in Sudan, Shafiee (2015: 28) criticises the government's attempt to establish state-level microfinance institutions to contribute to resettlement processes without addressing the roots of religious and ethnic inequalities in South Kordofan and Blue Nile states, which ultimately led to war.

#### **4 Promotion of FoRB in the Poverty Reduction Programme in South Kordofan and Blue Nile states**

##### **4.1 Project implementation mechanism**

The agreement between the Sudanese government and the IsDB regarding the Poverty Reduction Programme has been signed by the Federal Ministry of Finance and National Economy, which manages the implementation of the project as part of a country-wide strategy. The project was for US\$10m for three years, starting from January 2016 to January 2019 (Republic of Sudan 2018). CBOS is the main microfinance regulatory body offering technical support and training for Islamic Microfinance Firms (IMFs) and monitoring their performance.

IMFs have been established in each of the two states to channel IsDB funding to targeted persons. IMFs are not-for-profit civil society organisations, managed by a board of directors from CBOS, the Ministry of Finance and National Economy, IsDB representatives, and various religious and ethnic community representatives. In each board, one third of the directors are women. IMFs work through various partners, mediators, community groups, and non-governmental organisations (NGOs) to reach out to poor people needing the funds to start their own small businesses.

The field study findings show that this management structure is very complex and ineffective in responding to the local emerging demands and needs. The managers of the two firms must report both to the Ministry of Economy and Finance and to CBOS.

The complicated management structure has affected the promotion of FoRB within the project, and it restricts the project's ability to engage in partnerships with local religious leaders. The two microfinance managers need approval from the Ministry of Finance and National Economy prior to engaging in any partnerships on a local basis. On some occasions, their planned activities must be altered according to the ministry's request, which have serious implications on practical aspects of the projects. Mr Mohamed Abdalbagee, the Microfinance Firm Manager of Blue Nile state described the structural complexity:

*We spend months trying to build trust with local religious leaders from different religious minority groups, and once we reach agreements of working relationships, the plan must be changed if it has not been approved by the Ministry of Finance in Khartoum, although it has been approved by CBOS.<sup>3</sup>*

#### 4.2 Project objectives and strategy to promote FoRB

The IsDB Poverty Reduction Programme case study presented here explores the strategy pursued to promote FoRB in the development project in Kordofan and Blue Nile states. The primary objective of the project is to assist with social resettlement and peace-building processes, through poverty reduction and interfaith reconciliation interventions.

In its efforts to reduce poverty and restore peace and religious reconciliation, the project has adopted three main strategies to implement its objectives (see Table 9.3):

- 1 Economic intervention to rehabilitate the shattered economy and generate income and employment opportunities, through direct microfinance funding for individuals and group microenterprises and small businesses.
- 2 Funding community-led development projects to provide services and goods to the local interfaith and inter-ethnic communities, such as schools, health centres, and building and water supply services.
- 3 Interfaith reconciliation interventions, through a vast array of projects that concentrate on uncovering the past, promoting interfaith dialogue and understanding, using community media to counter religious hate and to promote religious tolerance, and working together towards the common goal of promoting FoRB.

In this chapter, we focus on one stream of activities, namely individual and group microfinance activities.

#### 4.3 Religious and faith inclusive funding: accessibility regulations for individual and group funding

Through the microfinance firms in the two states, the IsDB project offers non-financial services, such as training and health insurance, to all applicants irrespective of their religious or ethnic background. In a Zoom interview, the Blue Nile state's Microfinance Firm Manager, stated:

*[T]he microfinance-funded projects in the two states are designed to contribute to interfaith reconciliation and peace building through addressing religious inequality, as well as to assist with resettlement of displaced people, and to enable poor people to start their own businesses to generate income for themselves and [their] families, and to contribute in [sic.] the economic development of the locality. (Abdalbagee pers. comm. 2020)*

In the main programme agreement between IsDB and the Sudanese government, it is written: 'Islamic Microfinance should be made available to poor and displaced people in the two states irrespective of their religious and ethnic background, especially to women and youth' (Ministry of Economy and Finance 2015: 13–14). It could be said that this is the first step in promoting FoRB in the Poverty Reduction Programme in the two states.

This inclusive policy orientation has been endorsed by a public call for a project funding proposal from the population, irrespective of religion, ethnicity, or gender background. In its publicity work, the project made it

**Table 9.3 IsDB project objectives and strategy****IsDB Poverty Reduction Objectives and Implementation Strategy**

Individuals and groups micro funding	Community development projects	Interfaith and ethnic reconciliation
<b>Objectives</b>	<b>Objectives</b>	<b>Objectives</b>
<ul style="list-style-type: none"> <li>• Assist individuals and groups affected by the war to resettle and engage in economic and social activities.</li> <li>• Poverty reduction.</li> <li>• Create self- and group employment opportunities.</li> <li>• Assist with local production and delivery of goods and services.</li> <li>• Assist with ethnic, religious and faith reconciliation.</li> </ul>	<ul style="list-style-type: none"> <li>• Building of community services to assist with resettlement and interfaith acceptance and tolerance.</li> <li>• Building community capacity through training, community leadership.</li> <li>• Widening participation of religious leaders in religious and interfaith acceptance and tolerance, and reconciliation.</li> </ul>	<ul style="list-style-type: none"> <li>• To achieve interfaith and inter-ethnic reconciliation and religious tolerance.</li> <li>• To promote FoRB in all aspects of the project, activities, and social life.</li> <li>• To prevent or resolve the occurrence of religious, faith or ethnic violent conflicts.</li> </ul>
<b>Activities</b>	<b>Activities</b>	<b>Activities</b>
<ul style="list-style-type: none"> <li>• Individuals funding.</li> <li>• Multireligious group funding.</li> <li>• Setting up of local cooperative to deliver basic goods and services.</li> <li>• Provision of non-financial services, such as training, project insurance, advice, and advocacy for project owners.</li> </ul>	<ul style="list-style-type: none"> <li>• Religious and faith leaders' engagement.</li> <li>• Establishment of locality-based ICDCs to lead community engagement and participation in identifying local needs.</li> <li>• Building of community services such as schools, water supply, health centres, rebuilding of religious venues destroyed during the war.</li> <li>• Rebuilding interfaith trust and mutual understanding through jointly managing community projects.</li> </ul>	<ul style="list-style-type: none"> <li>• Developing grass-roots structures.</li> <li>• 'Uncovering the past' activities.</li> <li>• Promote interfaith dialogue.</li> <li>• Community media project.</li> </ul>

clear that it encourages people from various religious backgrounds to apply for the microcredit funding. In the internal policy of funding application assessments, religious and ethnic identity is not taken into consideration when assessing project funding applications.<sup>4</sup>

The project has promoted microfinance funding for individuals and groups of microenterprises, as well as for small businesses to generate employment and income. Such projects have particularly targeted poor people and those who have been affected by the war and armed conflicts. They have provided short- and medium-term loans, and occasionally technical assistance, to these new entrepreneurs.

In Kadogli, in South Kordofan state, a group interview with ten female farmers who had received project funding revealed that they had heard of the project from religious leaders, schools, and on the local radio, and that all women and men – Muslims and Christians – could apply for funds to start their own business and pay back the money without paying interest.

They had all applied for funding to meet the demand of the agricultural season and had received it.

To encourage promotion of FoRB and interfaith interactions, the project has encouraged joint business enterprises involving members of different religious groups and allocated additional financial grants, and free project insurance for multireligious and multi-ethnic group projects.

For example, in the location of Damazein, a group of ten women worked together in poultry: a Muslim woman worked to produce eggs, a Christian woman worked to produce chickens, and a third partner from the religious group of Ombraro made egg cartons. Such multifaith ventures have been repeated in all localities. Through daily group activities and interaction, partners are expected to understand each other's religious diversity, and learn to accept each other's religious differences and promote collaboration and religious tolerance.<sup>5</sup>

In an interview with Mr Manna Kamal, a Christian ICC member in Geysan locality, Blue Nile state, he said:

*The project policy of encouraging multireligious and faith groups projects, has assisted in social interaction and interfaith reconciliation between diverse religious, faith, and ethnic groups, as project partners learn how to trust each other and to collaborate to achieve common economic interests.<sup>6</sup>*

Although funding for individual projects is religiously inclusive, the study shows that such efforts have partly alleviated the suffering of the highly vulnerable groups from diverse religious backgrounds, while they seem to have had only a modest effect in promoting FoRB and religious reconciliation. By their nature, individual microenterprises tend to have limited backward and forward linkages to the larger economy. They employ family labour and cater to local markets. As a result, they do not generate many opportunities for interfaith interactions, and funding for different groups' small business ventures is only slightly better, to the extent that they are more prone to seek labour and capital, as well as to operate at markets, beyond family and their immediate community – undertakings that increase opportunities for interaction. The project policy for group funding encourages individuals from diverse religious backgrounds to work together in one funded project.

#### 4.4 Funding community services development projects

The IsDB project provided financial resources to rehabilitate the devastated physical infrastructure – utilities, schools, water sources, road routes for animals, and local markets. Such reconstruction has expanded economic opportunities and generated increased employment. It targets areas where most of the population is from religious minority groups. For example, the creation of local markets has facilitated movement of goods, services, and people between different localities, and there is some evidence that it has been contributing to the economic and political integration of the states. The intention was that the integration can act as the foundation for ethnic and religious interaction and promote understanding and tolerance. It is,

however, too early to assess the effects of infrastructure rehabilitation on interfaith reconciliation.

The project has established locality-based ICDCs to lead religiously inclusive community participatory planning processes in identifying local needs for goods and services, and in managing the community service projects. ICDC members are local community activists representing all religious and faith groups in the locality, as well as gender and ethnic representation.

A community leader stated that ‘ICDC members are trained in community leadership, religious diversity and reconciliation, and community project management skills. The nature of community projects differs from one locality to another, depending on locally identified needs, and includes schools, water supply, health-care centres, rebuilding religious venues destroyed during the war, health insurance services, and illiteracy classes for children and adults.’<sup>7</sup>

#### 4.5 Religious and faith leaders' engagement approach

FoRB is promoted in the IsDB Poverty Reduction Programme through close partnerships with faith and religious leaders who have been vetted on the basis that they are already actively engaged in promoting FoRB. In each of the two states, the IMF has facilitated the formation of an overarching ICC in each locality. The ICCs consist of religious and faith leaders who also represent various ethnic and gender backgrounds. On average, an ICC consists of 20 members, and in total there are 45 ICCs in the two states. Members of the ICCs are elected by their local communities as religious and community leaders with religious, social, and political influence, and they are well respected and listened to by their local communities.

ICC members have been trained for their roles as community leaders, and on how to promote ethnic, religious, and faith inclusion in states that have witnessed religious tensions and armed conflict. They were also trained on how to work together towards the common goal of promoting FoRB within the local communities. Each member must sign a religious and faith tolerance and acceptance code of ethics, which makes it clear that they are encouraged to promote religious tolerance and are not allowed to practise any form of religious hate or discrimination.

The ICCs have been promoting FoRB in the project through their role of reaching out to individuals from various religious and faith backgrounds, who may need funding. They thereby send a strong message to the local communities that Islamic funding is available to all who need it irrespective of their religion and faith. In fact, this message of promoting religious inclusion is very new in the two states, which have witnessed religious and faith-based fragmentation, tensions, and armed conflicts.

The ICCs work alongside the two IMFs to assist with community engagement and reach out to service users to help them manage their funding applications. The ICCs have become an integrated part of the day-to-day project decision-making and management process.

Religious venues are used by the ICCs to promote religious acceptance and tolerance. They are used as community training venues, to train the local population on interfaith acceptance. Churches and mosques are also used as outreach contact points for the project funding to individuals from

different religious and faith backgrounds. Weekly advice surgeries on the project's funding processes and funding proposals are held in mosques and churches.

Mr Majeid Kan, an Ombraro<sup>8</sup> leader in Blue Nile state, said in an interview:

*It is new experience for our local people to visit other religions' venues, and to be trained on religious acceptance. During the armed conflicts, churches and mosques were destroyed as expression of religious hate.<sup>9</sup>*

Integrated activities of the IM project in the two states include capacity-building and training 1,500 faith and religious leaders to become community pioneers to work towards the common goal of promoting FoRB and religious inclusion in local communities. Mr Remi, a Christian priest in Blue Nile state, described the experience:

*It was not easy for us to trust Muslims again after our long suffering from the government. Why do they want to fund us to start our own projects? Why is there Islamic funding for non-Muslim communities? Because our local people need the funding to be able to continue their livelihoods, which have been disturbed by war. We work hard with other religious and community leaders, then we discovered that it is not our local Muslim leaders who destroy[ed] our livelihoods and fought against us. It is the government in Khartoum. We must work hard to build trust and ability to work together to benefit in our local community. Most of the poor people do not have any other access to financial credit apart from this Islamic lending through the microfinance project.<sup>10</sup>*

Another project consisted of training and funding for 250 young people with disabilities resulting from the war, from various faith and religious backgrounds: the training on digital and social media enabled them to promote FoRB and the Islamic Microfinance Project more widely, and hence inclusion of all intersectional and marginalised groups within the two states (Ministry of Economy and Finance 2017: 7).

In a group interview with ten of the trained religious and faith leaders, one participant said:

*[T]he training we have received on community leadership by the project in 2016 enabled us to become more sensitive and respectful to religious and faith background differences. It helped us to challenge religious, ethnic and faith prejudices and discrimination between different groups.<sup>11</sup>*

Although FoRB was promoted in the project through the engagement of religious and faith leaders, some of them found it very difficult to trust the project's agenda, i.e. to promote inclusion and poverty reduction through religious-based funding. One of the Christian leaders expressed this reluctance in an interview:

*As people who come from Nuba background, we suffered quite a lot of marginalisation and ethnic cleansing by the Islamic and Arab government of Sudan, supported by Saudi Arabia and other Arab states – how come they now want us to trust their motivation to alleviate poverty in our area, which has been created by them?*<sup>12</sup>

He also asked:

*Why is it called Islamic Microfinance, why not just a microfinance?*<sup>13</sup>

From the field study data, it appears that promotion of FoRB through Islamic-based microfinance is problematic and complex. The local communities need microfinance funding to start their own projects and thereby try to rebuild their livelihoods, which have been disturbed by the war between the SPLM and the SAF. But one of the main reasons that the war escalated was that the SPLM claimed it was fighting religious and ethnic discrimination and marginalisation, taken forward by the Islamic government in Khartoum. That the IM project tries to help the communities to rebuild their livelihoods and resettling through Islamic funding is a very insensitive approach to promote FoRB in development.

Women are not seen as religious leaders: only three out of the 15 members elected to join the ICC in South Kordofan state are women, while only two women have joined the Blue Nile ICC to represent service users.

The depth and strength of the leading role played by the ICCs in promoting FoRB in the two states is demonstrated by their dedicated effort to influence the IMFs to publicise details of their ethnic and religious inclusive funding to various religious groups. As a result, the IMFs have adopted a clear public statement of faith and religious funding available to all residents irrespective of their religious background.

Members of the ICCs have assisted in expanding the beneficiary base of the project by promoting the IM project to their communities and at neighbourhood level, through personal contact and through weekly markets, and social and religious events. The ICCs have further advocated for the project and reached out to the most marginalised and isolated non-Muslim groups, who have suffered from religious persecution by the Islamic government of Sudan.

In answer to a question about the local population's knowledge of the project's inclusive funding policy, 38 out of 50 interviewed people referred to religious and faith leaders as their main source of knowledge, while only three had heard of the project from the project directly.

Religious leaders have also acted as finance guarantors for poor individuals who lack any credit worthiness and the ability to repay the loans.

In fact, religious leaders themselves often do not have the money to guarantee the lending, but they use their religious influence and respect in the community to ensure that individuals will be able to pay back the loans, as agreed with the respective microfinance agency. Seventy-eight per cent of the people interviewed have been guaranteed funding through the trust of ICC members.

One ICC member, who represents the Ombraro community in Damazein, explained:

*Although our local community members need microfinance funding, the only option we have is the Islamic Microfinance, so we have to take it as there are no other options.<sup>14</sup>*

The ICC members occasionally have been criticised by extremist religious leaders and especially Muslims, who believe that IM should only fund Muslim people and accuse the ICC of taking resources and options from the Muslim people (ICC member<sup>15</sup>).

Although the project has invested in creating capacity of the ICC members, deep-rooted religious and ethnic divisions, together with the experiences of the many people who lost relatives and homes, or who are suffering from disabilities as a result of the war, have impacted the project's ability to promote FoRB via the IM interventions. The social and political cohesion is still very fragile. One can say that through day-to-day activities, the ICC members work towards the common goal of promoting FoRB and have contributed to building trust and religious inclusion.

The study finds that religious minority groups have faced systematic marginalisation and discrimination by the Islamic government of Sudan since 1990, and therefore promoting FoRB through IM is a vast and complex challenge. Religious minority groups have no source of microfinance apart from IM, which makes them feel even further undermined.

## **5 Conclusions**

The IsDB has not adopted a strategic approach to the promotion of FoRB in its development framework. Considering the complexity and uniqueness of the political and social context of the situation in Sudan, the IsDB has attempted to promote FoRB at a practical and operational level through its Poverty Reduction Programme in South Kordofan and Blue Nile states. Local community experiences discussed in this chapter highlight opportunities and challenges in promoting FoRB in development at both strategic and operational levels. There is a vital need for coherent and consistent rights-based approaches to promoting FoRB at all levels of development interventions.

Blue Nile and South Kordofan are among the poorest states in Sudan, which suffer from war as a result of religious and ethnic marginalisation, put forward by the Islamic government of Sudan. In this context, one can say that promoting FoRB through religious-based microfinance funding may not be the most durable or appropriate solution.

From the view of the service users and local communities' experiences, the project contributed to engaging local religious leaders, and local religious institutions and venues, which can promote FoRB, even if religious reconciliation proved to be difficult.

Before the IsDB project, the local society was fragmented, faith and religiously divided, and there was very limited social interaction between the various religious and ethnic groups. In fact, social relations between the different religious groups were very hostile, which led to many religious and faith tensions and armed conflicts between various religious and ethnic groups, especially between Christian Nubas and Muslim Arabs in South Kordofan state, and between the Ombraro and the Muslim community in Blue Nile state.

**Table 9.4 Source of knowledge among the local population of the programme funding opportunity**

How do you know that funding is available for all members of the local population irrespective of their religious, faith, ethnic or gender background?	Total answers
Through local religious and faith leaders	38
Local radio	2
From the project directly	3
From a friend, neighbour or somebody I know	7
Others	0
<b>Total</b>	<b>50</b>

Under these circumstances, it is unrealistic to talk about immediate restoration of mutual trust between diverse religious and ethnic communities, in the immediate aftermath of severe, brutal armed conflict and war, started as a result of religious and social injustice and discrimination.

However, through religious inclusive participation processes in the project activities, involvement of religious leaders, and the community training and dialogue activities, the project has started the process of interfaith trust-building and collaboration.

In the context of Sudan under the previous Islamic government (1989–2019), Islamic Finance is not the best way to promote religious harmony among diverse religious and faith communities. Islamic Finance was introduced by the government as part of the Islamisation process of the banking and finance system in Sudan, which replaced the international finance and banking system. This in itself led to religious discrimination against people of other religions and faiths, who are forced to deal with Islamic Finance which contradicts their religious beliefs.

In the case of South Kordofan and Blue Nile states, war was started as the result of feeling of religious discrimination by non-Muslim local communities. Therefore, introducing Islamic Microfinance as the only option available for non-Muslim individuals contradicts the principles of FoRB.

## Notes

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- † This chapter is the result of work carried out by an extended research team established for the sake of the study. The research team comprised Razan Aboobyda, Osman Garallah (in Sudan), and Rehab Allawi (in Saudi Arabia) who facilitated secondary and primary data collection in the very challenging health and social context of Covid-19 lockdown in Sudan and Saudi Arabia. Thanks are due to the many practitioners, and community and religious leaders who engaged in interviews and in stakeholder meetings, and provided additional documentation and insights. Many thanks to Lasse Morthorst for his dedicated efforts to improve the content of the chapter. Email Manal Ahmed (Elehemier): [Underthetree121@gmail.com](mailto:Underthetree121@gmail.com).
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  - 2 **Global Hunger Index.**
  - 3 Manager, Blue Nile State Microfinance Firm, Damazein locality, Blue Nile state (pers. comm., Zoom 2020).
  - 4 Alfatih, Manager, South Kordofan Microfinance Firm, Kadoglee, South Kordofan state (pers. comm. 2020).
  - 5 Women farmers Nile state and South Kordofan state (pers. comm. 2020).
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  - 7 A. Fatima, Interfaith Community Committee member, Geysan locality, Blue Nile state (pers. comm. 2020).
  - 8 A religious and ethnic group.
  - 9 Pers. comm., 2020.
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# Chapter 10

## Freedom of Religion or Belief Blind Spots in Development and Peace-Building Theory and Practice\*

Katharine Thane<sup>1</sup>

### 1 Introduction

Development and peace-building approaches, literature, and especially practice, have not historically integrated considerations of the right to freedom of thought, conscience, religion, or belief. Integration between freedom of religion or belief (FoRB) and development and peace-building remains in its infancy and has not yet been pursued in earnest, meaning that for the many reasons this chapter explores and in nearly all cases, FoRB continues to fall through the cracks in development and peace-building work. Likewise, FoRB has not yet been comprehensively expressed in development and peace-building theory and practice-relevant language.

This chapter seeks to provide a non-exhaustive snapshot of the extent of integration of FoRB in some of the major development and peace-building approaches in English-language academic and non-academic literature and practice since 2000. It also starts to unpack the relationships between FoRB and development and peace-building goals, and the relevant synergies. This chapter provides an initial insight into key gaps which require earnest work to address. It is based on an analysis of secondary sources that exist on the synergies between FoRB and development and peace-building and is informed by my praxis: from actively working with policymakers, academics, and practitioners at UK, European Union (EU), and United Nations (UN) level over the past nine years on FoRB. Through different roles in my career, an initial narrow focus on FoRB inevitably widened into the inter-related broader human rights, development, and peace-building work spheres. This broader approach is critical to understand and support the sustainable transformation needed in communities to realise FoRB.

The right to FoRB is an important piece of the puzzle for realising sustainable development goals and better informing processes for building and sustaining peace and long-term development. A 'FoRB lens' in development and peace-building work better enables the consideration of seen and unseen dimensions of people's multi-faceted identities relating to their thought, conscience, religion, or belief systems. This dimension of human identity influences people's actions and can lead to discrimination against and violence towards those perceived as the 'other'. It is this 'othering' that produces or legitimises the different and unequal political,

socioeconomic, civic, and cultural experiences in a society (Tadros and Sabates-Wheeler 2020). Considering the right to FoRB – with the full scope of its meaning and its development context in mind – helps to ensure that all dimensions of human identities, inequalities, and related discrimination and violence are brought to light and analysed. This will be crucial for responding to the existing inequalities that the Covid-19 pandemic has entrenched (PaRD 2020b).

The need to apply a FoRB lens is evident from the statistics alone – over 1.6 billion people now live in fragile or conflict-affected contexts globally (UNDP n.d.a.) and an unprecedented 79.5 million people (and increasing) had been subsequently forcibly displaced by the end of 2019 (UNHCR 2020a). We have also borne witness to systematic violence that has FoRB elements, internationally deemed genocide, in Myanmar, Syria, Iraq, and Nigeria. Blind spots cannot be afforded. Even organisations that deal primarily with the symptoms, rather than the root causes, of discrimination and conflict, including the United Nations High Commissioner for Refugees (UNHCR), still have few tools to comprehensively assess dynamics, vulnerabilities, and needs based on religious or belief identities.

Despite these realities, FoRB remains a foreign concept to many working within development and peace-building spheres (even when a human rights lens is applied), despite FoRB's growth in popularity in international policy spheres over recent years. As such, there are numerous blind spots in the application and potential integration of FoRB within development and peace-building theory and practice and vice versa. While attempts at highlighting the areas of overlap or possible integration have begun to emerge, this chapter finds that this work remains in its infancy, with significant scope for further academic and practical enquiry and integration.

Development and peace-building academics and academic practitioners have begun to recognise religion, faith, and belief as a relevant social dimension for their work. They also inherently engage with the social, economic, political, civic, and cultural inequalities that are repercussions of discrimination or violence including that based on 'othering' of a different religion or belief. This engagement, however, scarcely refers to or frames these approaches through the right to FoRB and working on these issues does not inherently entail that FoRB is being considered or sought.

The persistent ambivalence towards the value of accommodating the right to FoRB, a topic viewed as complex and troublesome, in the largely secular Organisation for Economic Co-operation and Development (OECD)-conceived development and peace-building frameworks, has ensured that FoRB has remained a topic that is overwhelmingly overlooked.

In Western secular spheres, there remains a perception that many of those working on FoRB engage with it because of their own religion or beliefs and/or work with a religious or belief-based institution or networks which they want to support (Tadros and Sabates-Wheeler 2020). Supporters of those working on FoRB are then presumed to potentially support hierarchical and patriarchal religious systems (Religion & Diplomacy 2020). This perception misinterprets the nature of the right to FoRB which equally protects the right of individuals to, for example, interpret and practise religion or beliefs that stand against the patriarchal orthodoxy of their own communities (Petersen 2020).

This perception is accompanied by various other practical and theoretical reasons for the disconnection between, and reluctance to integrate, FoRB, development, and peace-building. These include the existing mistrust between people, their work, agendas, and construction of priorities or hierarchies of suffering within the three different spheres; the gulf between the different frameworks of language and reference within the different spheres which means concepts are difficult to translate; and the boundaries of programmes' frameworks set by stakeholders and donors.

The overwhelming disconnects between these spheres of expertise means that work on the different topics continues to operate in silos, undermining the full realisation of development and peace-building objectives as well as the right to FoRB itself. The disconnection is reflected in the literature, approaches, and practice findings below, and signals the need for collaborative action between these spheres of work, based on deep listening. Many voices are also still missing, including those with minority identities within a community. As such, listening to these voices to increase much-needed disaggregated data through this collaborative approach is imperative for understanding and responding to religious and intersecting inequalities and subsequent violence, to enable the realisation of development, peace-building, and FoRB objectives alike.

The term 'development' is inherently broad and contested. In this chapter, it refers to a multidimensional and multisectoral process involving social, economic, and political change that aims to improve wellbeing (Tadros and Sabates-Wheeler 2020). This includes both the institutional processes and dynamics as well as the people involved in meeting development goals. In this chapter, there will be a particular focus on 'development' work that is being taken within the context of the all-encompassing and most recent internationally recognised framework, the '2030 Agenda for Sustainable Development' (UN 2015).

The term 'peace-building' and related work in this chapter refers to preventative and post-conflict efforts in conflicts, and particularly in those with religious or belief elements. While there are many elements to this work, Galtung's (1976) seminal work defines it as 'creating structures to promote sustainable peace by addressing "root causes" of conflict and supporting indigenous capacities for peace management and conflict resolution'.

'FoRB' is used as a shorthand for the human right captured in Article 18 of the Universal Declaration of Human Rights (UDHR) (UNGA 1948) and the International Covenant on Civil and Political Rights (ICCPR) (UNGA 1966) which encompasses freedom of thought, conscience, religion, or belief. This human right inherently sits within the broader context of all other human rights and, as per Article 18(3), cannot be advanced and implemented at the expense of another human right (Bielefeldt 2020).<sup>2</sup> Violations of FoRB signal the existence of inequalities between people of different religious or belief identities, for example affecting their levels of access to socioeconomic, political, cultural, and civic rights and services. These violations may result from various sources including government restrictions, social hostilities, and their interplay. Disaggregating FoRB violations by perpetrator, victim, and context is not always carried out but can be very helpful for determining responses and solutions.

## 2 FoRB's scope and relevance to development and peace-building approaches

Development and peace-building work inherently engages with the social, economic, political, civic, and cultural inequalities and subsequent violence experienced by people, including because of their religion or belief and intersecting identities (their gender, age, ethnicity, race, and so forth). As this chapter outlines, this work has not, however, tended to focus on 'religious inequalities' *per se*, nor sought to understand how religious or belief identities correspond with experiences of inequality.

Exploration of inequalities in development has focused primarily on economic and, increasingly, gender or disability inequalities. 'Religious inequalities' are widely understood as the marginalisation and exclusion experienced by individuals and groups on account of their actual or perceived religious or non-religious beliefs and affiliation, relating to unequal access to goods and services, and unequal opportunity or treatment (Tadros and Sabates-Wheeler 2020). They may shape experiences of inequality – mild or extreme – in themselves, or exacerbate or entrench experiences of other intersecting inequalities. Experiences of religious and intersecting inequalities vary in different contexts. Even within nominally homogenous groups, experiences differ between people, depending on, for example, their socioeconomic status or geographic location.

These different experiences of religious inequality are a symptom of the discrimination, whether direct or indirect,<sup>3</sup> and/or violence, sometimes systematic, that the right to Freedom of Religion or Belief (Article 18) (UNGA 1966) protects all people from, and promotes a change to. FoRB establishes the right of individuals to have and express, alone or collectively, the religious or non-religious beliefs that shape their internal belief systems and subsequent interaction with the world. Article 18(3) of the ICCPR sets out the contexts within which limitations to this right are legitimate. Importantly, FoRB's situation in the human rights framework means that it cannot be advanced at the expense of another human right.

The UN Human Rights Committee's General Comment 22 (UN HRC 1993) helps further outline **FoRB's scope**, referring to its economic, social, and cultural dimensions. The Committee clarifies that 'policies or practices having the same intention or effect [as compelling people to adhere to a specific religion or belief, by] restricting access to education, medical care or employment [to those who do not adhere, is] inconsistent with [FoRB]' (para. 5). The 2008 UNGA Resolution 63/181 further clarifies FoRB's scope when urging states to step up efforts to protect and promote Article 18 by ensuring that 'no one is discriminated against on the basis of his or her religion or belief when accessing, inter alia, education, medical care, employment, humanitarian assistance or social benefits' (UNGA 2008, para. 9c). Petersen (2020: 21) highlights that 'poverty and socioeconomic marginalisation are both a consequence of other types of discrimination, including religious or belief-based, whether legal, institutional or societal, and an exacerbating factor in these types of discrimination'.

FoRB therefore provides a lens from which to understand, analyse, and respond to the lived experience of inequalities between different groups who are of a religious **or** non-religious background.

Because it supports the analysis of structural inequalities within societies, based on people's often (less visible and) overlooked religious or belief identities and related experiences, a FoRB lens allows us to have a more nuanced and comprehensive understanding of, and response to, the inequalities we see. Importantly, for this comprehensive understanding to be achieved and inform policy and practice, FoRB must be understood and explored in its full scope, relating not just to the practice of one's religion or belief but also any negative impacts on one's social, economic, political, civic, and cultural individual or collective experiences on the basis of religion or belief. This includes where any inequalities found between people are between or within minority or majority groups of the same faith, different faiths, or no faith. A FoRB lens is therefore relevant regardless of the intensity of the inequality or conflict and whether it is directly or indirectly perpetrated at the hands of state or non-state actors alike.

**Our identities are never one-dimensional.** As Tadros (2020: 5) outlines, 'people have many identities that work together to affect their status and their role'. Our religious or belief (including non-belief) identities therefore intersect with other aspects of our identities, including our ethnicity, race, gender, age, disability, origin, and other invisible targets of hate, as the right to non-discrimination in the various human rights treaties recognises (UNGA 1966). Just as a person's socioeconomic status impacts their experience of religious and other inequalities, so too do our intersecting identities. Different intersecting aspects of our identities may compound the inequality experienced, including within a religious or belief community. We may find that Uyghur, Rohingya, Yazidi, and Christian young women disproportionately suffer more from the discrimination and/or violence that underpins the religious inequalities, as a result of their gender and age, in comparison to women in their context from their own or even prevailing faiths. As Petersen (2020: 15) outlines, 'religious-based discrimination has gendered consequences [for example], and gender-based discrimination has consequences for religious minorities or others with a particular religious identity'. Experiences of economic exclusion can 'be further compounded by the fact that not only are the women poor but they belong to religious minorities' (Tadros 2020: 22).

Just as the hierarchisation of rights is not supported by the human rights framework, neither is the importance of protecting one aspect of peoples' identities above others. When working with people through development and peace-building work, it is important that all aspects of people's identities are engaged with. The religious or belief aspects of people's identities and how this influences discrimination, violence, and subsequent societal inequality dynamics should neither be ignored nor prioritised. They need to be understood and 'right sized' (Griffith-Dickson *et al.* 2019) to the context in question. This approach will help to ensure that there are fewer gaps when seeking to address inequalities.

Violations of FoRB also expose the '**identity markers**' attached to humans based on their perceived or actual religious or belief identities. These markers can be used to reinforce difference – our sense of self and what we have compared to others – and the understanding of religious and intersecting inequalities in the societies we live. Collective 'othering' based on religious and intersecting inequalities creates fertile ground for

grievances to build. Perceptions and narratives of religious and intersecting inequalities can be incited at a group level and used to justify discrimination or violence towards identified ‘others’ (Collier and Hoeffler 2004; Keen 2012; World Bank 2011). This occurs across socioeconomic status; relatively privileged groups can be motivated to initiate conflict to preserve access to power and resources (Cederman; Gleditsch and Buhaug 2013; Østby 2013). Even where discrimination or violence is not directly perpetrated, inaction in tackling dangerous ‘othering’ narratives leads to enabling environments where targeting is more likely to occur. The OECD (2018: 6) estimates that the number of people living in fragile contexts will rise by half a billion to 2.3 billion by 2030.

Religious inequalities differ by context because in different contexts, people’s grievances and related needs, and the triggers for discrimination and violence that produce or entrench inequalities differ (Baghat *et al.* 2017). Conflict exacerbates inequalities and the growth of enabling environments for further discrimination, which increases the likelihood of recurrent violence (Petersen 2020). These cycles entrench the vulnerability of those most at risk.

Identifying the particular conflict dynamics in relation to FoRB violations is also helpful for reminding us of the **individual drivers and root causes of discrimination and conflict** that lie in every individual person’s thought, conscience, religion, and/or belief. Looking at conflicts solely through a socioeconomic inequality lens misses this important internal or *forum internum* dimension, which the right to FoRB engages with. This level of root cause enquiry into the individual’s thought, conscience, religion, or belief is critical for peace to truly be built. This is not an easy endeavour. As political scientist Jonathan Fox (2016: 32) notes, it is ‘far easier to uncover and measure the extent, nature, and consequences of religious discrimination than it is to do the same for its causes’.

Agenda 2030 (UN 2015) is at present one of the primary frameworks through which FoRB’s relevance to international development, and within this, building peaceful societies, would be expected to be broached. This agenda of 17 Sustainable Development Goals (SDGs) further encompasses peace-building through the promotion of peaceful societies (SDG 16). FoRB’s relevance is most evident in relation to SDG target 16.b, to: ‘promote and enforce non-discriminatory laws and policies of sustainable development’ (*ibid.*: 30) and SDG target 10.2, to: ‘empower and promote the social, economic and political inclusion of all, irrespective of age, sex, disability, race, ethnicity, origin, **religion** or economic or other status’ (*ibid.*: 25, emphasis added). SDG 16 recognises that sustainable development requires inclusive, just, **and peaceful** societies and institutions. This in turn requires there to be ‘no discrimination in law or policy’, which inherently includes that on the basis of religion or belief as protected by FoRB. SDG 10 recognises that sustainable development also requires reducing inequalities – including religious inequalities – within and among countries. This, in turn, requires ‘the social, political and economic inclusion of all, irrespective of ... religion’ (or belief) (*ibid.*: 25), which FoRB also encompasses.

FoRB also plays a fundamental role in the realisation of other development objectives including those captured by SDGs 1, 2, 4, 5, 6, and 8 in relation

to ending poverty, hunger, ensuring good health and wellbeing, quality education, gender equality, clean water and sanitation, and decent work, respectively. These goals cannot be reached if people are denied or have unequal access to them on the basis of their religion or belief. In this sense, they will be 'left behind', just as they would be if a FoRB lens is not applied to SDGs 10 and 16. As such, without a FoRB-sensitive lens, the overarching objective of Agenda 2030 – leave no one behind – will remain unmet.

A FoRB lens better supports conflict reduction and prevention processes by helping identify religious and intersecting inequality dynamics and pointing to solutions for root causes and drivers based on their collective and individual thought, conscience, religion, or belief. A FoRB lens therefore also importantly helps ensure that different identities, needs, and experiences are taken into account, as part of developing equitable responses that are needed to realise development goals, including the SDGs. Importantly, the integration of a FoRB-sensitive lens in development and peace-building must not be conflated with a **religious** lens which focuses on the value of religious actors' involvement in, and religious perceptions of, development (Tadros and Sabates-Wheeler 2020). This focus on religion and religious institutions' roles in delivering development initiatives has been the more common association of religion with development and will be explored in Section 3.

### 3 FoRB's integration into development and peace-building

Although there has been some analysis of the links between FoRB, development, and peace-building in academic and academic-practitioner literature, evidence of its translation into tangible action in programming is scarce. The exploration, communication, and integration of these interconnected topics remains in its infancy. There are gaps and blind spots within the approaches, literature, and practice of each of the spheres of work regarding their interconnectedness and utility for each other. This is even though information and expertise on FoRB is a key piece of the puzzle for realising development and peace-building objectives, and vice versa.

The different frameworks of reference and language for FoRB, development, and peace-building, have developed largely in silos. Difficult and pioneering work to bridge these silos and explore and communicate connections between these spheres of work is required.

There are signs, however, of the emergence of bringing FoRB out of the cold where international development is concerned. CREID (the Coalition for Religious Equality and Inclusive Development) and JISRA (the Joint Initiative for Strategic Religious Action) are UK and Dutch government-funded coalition projects respectively that bring together development and peace-building partners to work on implementing FoRB in several countries globally, as well as inform development programming. The US Agency for International Development (USAID 2021b) established an advisory council in November 2020 for promoting religious freedom to build on specific socioeconomic support in Iraq and the region. Petersen (2020), Tadros and Sabates-Wheeler (2020), the UN Special Rapporteur on Freedom of Religion or Belief (UNGA 2020), and others have also started to outline and discuss the relevance and utility of connections between FoRB and development, including through the language of religious inequalities.

**Grim and Finke (2010: 216) and Durham and Clark (2015: 298) write on the place of FoRB in structuring peace-building processes and FoRB's role as a 'powerful stabilising force for building lasting peace'.** Others have begun bringing stakeholders across peace-building, development, and FoRB spheres together and facilitating a space to start unpacking the relevance of development initiatives to advancing FoRB and vice versa (for example, the International Partnership on Religion and Sustainable Development (PaRD) 2019a).

FoRB academics including Grim and Finke (2010), Philpott (2013), Durham and Clark (2015), and others have also started to outline the connections between FoRB and peace-building. They highlight, for example, that FoRB is an important consideration for successfully structuring peace-building processes and is a powerful stabilising force for building lasting peace. Philpott's (2013: 31) assessment that 'peace-building and religious freedom hardly seem to know each other', because few in the relevant fields have made strong connections between them or integrated them, remains overwhelmingly true.

Disconnects between the different spheres of work have been perpetuated by their differing funding sources and donor expectations. States have, for example, been one of the main FoRB, development, and peace-building funding sources, but FoRB work has been carried out in specific programmatic interventions at a distance from the central strategic and policy frameworks. Disconnection has also been perpetuated by the fears of those within the largely secular spaces of development and peace-building of supporting hierarchical, patriarchal, or otherwise harmful religious beliefs and practices (Religion & Diplomacy 2020). Ambivalence about the role that religion plays in tackling or perpetuating discrimination or conflict has given rise to a pervasive narrative in the West that religion and anything perceived as protecting it, such as FoRB, is deemed too much of a minefield and thus better avoided altogether (Basedau, Gobien and Prediger 2017).

This context was reflected in the work I did with UNHCR in 2018–19 to explore how FoRB considerations were being integrated into their assessments and subsequent practical assistance. UNHCR often deals with the symptoms of conflict, including those with religious or belief elements. Support and integration of non-citizens in a country is also important for that country's development. One in four people in Lebanon were refugees when I visited Beirut and the Beqaa Valley on the border with Syria in January 2019 with UNHCR, the UK All-party Parliamentary Group for FoRB, and the non-governmental organisation (NGO) Aid to the Church in Need.

We found that different refugee communities were being supported by different organisations based on their religion or belief. A mistrust and breakdown of communication between UNHCR and many Syrian Christian refugees meant that they were being supported by Lebanese Christian organisations instead of UNHCR. Different sources of support to different refugees had, in turn, created tension between the refugees along religious identity lines. It also meant that refugee databases were not comprehensive or were out-of-date.

UNHCR's *Guidelines on International Protection (No.6)* (2004) do provide some general overarching guidance around FoRB but it is unclear what mechanisms UNHCR have in place to assess the context-specific FoRB dynamics and subsequent needs of refugees and between refugees and the wider population in the countries they work. There has been no evident engagement or reflection on FoRB and all its intersections with relevant issues across UNHCR as a whole.

Meetings with the UK cross-government Stabilisation Unit in 2019 on the conflict in Nigeria also demonstrated that FoRB dimensions were not engaged with in relation to this and other fragile contexts. There was a preference for focusing exclusively on socioeconomic elements and drivers in Nigeria (Brottem and McDonnell 2020), for example, perhaps relating to the perceived complexities religion or belief engagement brings. For 'hot conflict' policy and engagement, the establishment of a cross-governmental Joint Reconciliation Unit (JRU) in 2019 was sought so that the preventative dimensions of conflict engagement could be pursued. It was hoped at the time that FoRB would be part of the considerations within this work but the JRU was established under the Stabilisation Unit's remit with a smaller-than-expected staff, and the subsequent status of their engagement with FoRB is not evident. While these examples are not being used to generalise, they are indicative of the findings from engagement with other international development and peace-building workers. The findings in this chapter reflect the current status quo, as it is understood.

Deneulin and Bano (2009: 6), and many others, talk about the 'script' of development so far as having been 'heavily inscribed in the secular tradition'. Philpott (2013: 36) highlights that 'secularization theses' within peace-building spheres hold religion as 'either irrelevant or else inherently violent and divisive'. Horner (2017) talks about the need for a 'postsecular alternative framing' to peace-building through a 'deconstruction' of the 'religious-secular binary'.

Tomalin's (2006) framing that 'religious traditions often act against the pursuit of human rights' and Basedau, Gobien and Prediger's (2018b: 1106) finding of 'a negative relationship between religious dimensions and both income and gender equality' are just two examples of stated reasons why many development and peace-building practitioners have steered clear of FoRB. An institutional nervousness remains that because many of those involved in FoRB are religious or belief-based actors, they seek to protect their own communities, including the harmful religious beliefs and practices within them (Tadros and Sabates-Wheeler 2020; Werner 2019). James (2011: 2), for example, warns development practitioners to 'handle' faith-based organisations 'with care'.

This fear, however, obscures the fact that while FoRB does protect the right to believe in (but not necessarily put into practice) patriarchal norms on the basis of one's religion or belief, it also supports the right of each person to reject these norms (Religion & Diplomacy 2020). These misperceptions of FoRB equating it with the protection of religions or beliefs themselves may in part explain the lack of engagement with the discipline among development and peace-building academics and practitioners. FoRB's utility in understanding and addressing root causes and drivers of discrimination or violence is, therefore, overlooked.

Where there is some attention to religious exclusion and inequalities within development and peace-building work, it can often be superficial, as is indicated within some of the approaches below, treating this as one factor among many and a mere tick-box exercise. Work carried out through a human rights-based approach to development and the SDG framework, for example, often lists religious discrimination or inequality as one of many factors (OHCHR 2006; UNICEF 2012; SDG Tracker 2018). A superficial focus on FoRB elements within discrimination and/or conflict dynamics between groups, can miss the important and sometimes otherwise invisible dynamics, including those relating to the individual drivers and root causes, that require addressing.

While FoRB can be a critical tool to unpack inequalities, addressing ‘religious inequalities’ alone does not inherently entail that FoRB is truly being considered, integrated, and pursued in a way that means it can be tangibly realised. In many cases, even where FoRB or ‘religious freedom’ is named as an issue in development or peace-building analysis and programming, for example in USAID’s [website](#) (USAID 2020a), Search for Common Ground (2020b), and USIP’s literature (Nozell 2019), it is not clear that FoRB itself is being pursued as part of the measures to address any religious inequalities identified. Where the UNDP mentions that it is pursuing FoRB ‘to realise their overall objectives’, the extent to which FoRB is being pursued as an objective itself or by proxy within this programming is also not clear (UN IATF 2019: 16).

If FoRB violations are identified, the response to consciously pluralise an otherwise predominantly secular space with different religious representatives is sometimes presented as evidence that religious or intersecting inequalities is being pursued. This pluralisation itself is, however, not a proxy for addressing religious inequalities or FoRB abuses in a country context: one does not inherently lead to the other. This has been insufficiently clarified in some contexts, including in some parts of the UNFPA’s *Realizing the Faith Dividend* report (Karam 2016) where FoRB and religious voices are indicated as being one and the same. Notwithstanding, the report astutely notes in other parts that ‘these gaps help undermine the realisation of FoRB’ (*ibid.*: 53). The report (*ibid.*: 52) notes important caveats including the importance of not ‘overemphasising religious leaders’ or ‘over-moralizing the development agenda and partnerships’ and that ‘increasing religious rhetoric does not automatically lead to social inclusion’.

Narratives within faith and development G20 circles (Petkoff *et al.* 2020) also raise the benefits of religious freedom for building equal societies in the context of pursuing the SDGs but call for the mobilisation of faith-based networks, that include plural religious voices and greater work with religious institutions as the necessary response.

While engaging with faith networks may form an important part of the solution, a collective group identity focus risks missing the purpose of FoRB – to protect individuals’ religion or belief as opposed to collective religious or belief systems themselves, as clarified in UN Resolution 16/18 (UN Human Rights Council 2011). It also risks undermining FoRB by reinforcing the power of the (self-nominated) religious spokespeople and the existing norms in a society that may themselves perpetuate certain inequalities.

Even if religious or belief dynamics are specifically looked at through a FoRB lens, attention tends to stay at a collective ‘homogenous’ group level. This is in part because of the existing misperceptions that FoRB relates to protecting the perpetuation of religions or beliefs themselves (and in doing so, often perpetuates harmful policies). Deneulin and Shahani (2009: 264), for example, specifically warn against working on FoRB due to its use by religious movements to ‘endanger other human rights’. A focus on individual root causes and drivers relating to thought, conscience, religion, or belief-related discrimination or violence that FoRB itself engages with, is, as a result, lacking. Moreover, even in cases where this individual level is considered in peace-building work, no (conscious) links have been made to the relevance of FoRB.

It is because of this non-exhaustive snapshot of dynamics that in development and peace-building theoretical approaches, and particularly practice, FoRB falls between the cracks.

#### **4 The development context**

##### **4.1 Approaches to religion within development work**

Working on religion and with publicly religious persons within development work has become less uncommon since 2000 but has not been free of controversy. The German (Singh and Steinau Clark 2017), UK, Norwegian, and Danish governments as well as academics including Leisinger (2014) and Ulluwishewa (2018) have, for example, begun or advocated for bringing consideration of religion and religious perspectives into development spheres. There is not space here to outline in any detail development work’s turbulent engagement with the religious paradigm, and it is important to immediately note that, although evidently linked, such engagement is distinct to engagement with the human right to FoRB. Engaging with religion as a topic *per se* and religious persons in development work does not inherently lead to analysing, pursuing, or addressing religious or belief and intersecting inequalities and related conflict in-country in practice.

In 2000, Ver Beek stated that oversight of religion in a largely secularised development sector had been so systemic that it amounted to ‘a taboo’ (Ver Beek 2000: 31). When she joined the UN Development Programme in 2004, the Coordinator of the UN Intra-Agency Task Force on Religion and Development, Azza Karam, was told by the UNDP, ‘We don’t do religion’ (Geneva Centre for Human Rights Advancement and Global Dialogue 2018). When asked about this oversight and the possibility of missing important FoRB-related dynamics, development and humanitarian organisations still respond that their approach keeps them ‘neutral’ or ‘religion-blind’ (Wilkinson 2019: 3), not favouring or focusing on any one religious or belief community over another in their analysis or response to development issues. ‘Neutral’ is not, however, how many of those supported by organisations perceive them to be. Sceptical voices have raised concerns that development support is provided with a secular bias that is separated from a desired and ‘inter-related’ spiritual support (Öhlmann *et al.* 2018) or even carries Western imperialistic agendas (Tomalin 2018; Shakman Hurd 2017).

As noted, while consideration of religious dynamics can form an important part of tackling inequalities that stem from FoRB violations, it

does not inherently mean that religious or belief inequalities are being dealt with in any tangible way. In many cases, those considering religion and related issues do not even pretend to link their work to the right to FoRB which means it overwhelmingly gets overlooked.

#### 4.2 Working with faith-based actors in development

Development academics and practitioners alike have recognised that faith-based actors, including religious leaders, can be especially important for reaching development goals such as combating extreme poverty, including through their ability to deliver essential services (Marshall 2005) and their influence in vulnerable, marginalised, and hard-to-reach communities (White and Deneulin 2009). The role of faith actors in tackling the 2013–16 Ebola virus epidemic for example, is often referred to in encouraging partnerships for development agendas (Featherstone 2015). The World Faiths Development Dialogue from 2000 advocated for the ‘illumination’ (Marshall and Van Saanen 2007: 237) of the ‘world of religion... unseen by many development actors’ (Marshall and Keough 2004: 2) and a ‘move beyond dialogue to ideas for specific joint faith–development initiatives and programs’ (Marshall and Marsh 2003: xii).

The subsequent UN Interagency Taskforce on Religion and Development (UNIATF) Guidelines (UNFPA 2009: 1) encouraged ‘deliberate engagement’ with ‘like-minded partners among [faith-based organisations]’. And various initiatives including EU-Cord’s (2020) *Engaging with Local Faith Actors and Communities Toolkit* aims to guide this engagement (Watson, McLaverty and Sinibaldi 2020). Some UK and US government initiatives recognise the usefulness of these partnerships: USAID’s Center for Faith and Opportunity Initiatives (USAID 2021c) seeks to increase faith-based organisations’ access to funding, and the UK government reportedly works with more than 130 faith groups in 200+ development programmes (PaRD 2020 Annual Forum – PaRD 2020a).

Encouraging faith and development partnerships in the pursuit of the SDGs, is a current exercise for many development and related networks and organisations, such as the Joint Learning Initiative on Faith and Local Communities (JLIFLC) (JLIFLC 2015) and the International Partnership on Religion and Sustainable Development (PaRD) whose 2018 Memorandum of Understanding recognises the need for ‘effective faith-based organisation and religious groups’ partnership with public sector and secular entities’ (PaRD 2019b). Most of the larger development organisations such as the International Red Cross, Oxfam, and UNDP are absent from these networks.

A wider institutional nervousness, however, remains in the development sphere around partnerships involving religious groups or faith-based organisations, including with regard to their ‘agendas’ (Werner 2019; JLIFLC 2015). FoRB is, by extension, included within this nervousness due to the wide perception that it is a right primarily sought by religious groups to help protect religions or beliefs themselves and related harmful ‘traditional values’ and practices (Kane 2008: 362; Khalaf-Elledge 2020). Catholic organisations’ opposition to contraceptives is an example of perceived clashing agendas that legitimises the avoidance of secular–religious partnerships (Benagiano *et al.* 2011; NSWP 2015). Since the

1990s, post-colonial theorists have challenged Western development agencies' tendency to engage primarily with those 'conforming to their own image' and values rather than context-relevant and legitimate actors and approaches (Rakodi 2015: 17–35).

Despite an increase in encouraging partnerships, Tomalin (2018: 3) highlights that many faith-based development organisations operate as 'secular system culture brokers' on a 'dual register', 'secularising as they professionalise their public face, while retaining religious distinctiveness when engaging with co-religionists' (Lonergan *et al.* 2020: 3). This is evident, for example, in Christian Aid's (2020) report *Building Back with Justice: Dismantling Inequalities after Covid-19*, which does not discuss any religious element to the inequalities they focus on, while, elsewhere, they join others in promoting faith–development organisation partnerships. Meanwhile, faith-based actors in development spaces still report feeling invisible or that a clear space to raise the issues that their communities face is lacking.

#### 4.3 Human development (capability)

Various theoretical and practical development frameworks have relevance to the right to FoRB. Mahbub Haq and Amartya Sen's 'Human Development' work (Tadros 2020: 38) and reports in the 1990s placed people at the centre of the development process. UNDP's 1990 *Human Development Report* (UNDP 1990: 10) defined human development as 'both the process of widening people's choices and the level of their achieved wellbeing' economically, socially, politically, and culturally. On the back of Haq and Sen's work, the World Bank published its *Voices of the Poor* study (Narayan *et al.* 2000) using poverty assessments of 23 countries. The report recognised that social differences including those on the basis of religion, accounted for exclusion seen and those interviewed had more trust in local religious (traditional) leaders than those at state level.

In this human development work (for example, UNDP 2004), religion or belief and the wellbeing resulting from having and practising it, was subsumed 'rather superficially' under the 'cultural area', meaning that the religious and spiritual dimension to wellbeing and capabilities in this area have remained relatively unexamined (Tadros and Sabates-Wheeler 2020). Kirmani and Khan (2008), among others, have analysed the importance of faith in building trust among vulnerable, including displaced, communities and facilitating a greater sensitivity to their spiritual needs. Grim (2008: 3) has prominently advocated that FoRB 'augments socioeconomic wellbeing'.

Deneulin and Shahani's (2009) chapter 'Culture and Religion' in their *Introduction to Human Development and Capability Approach* helpfully analyses religion as a separate moral base dimension of wellbeing, and even as a human right. They quickly warn against working on FoRB as it endangers other human rights, stating that 'all too often, movements asserting religious superiority and seeking to impose their vision of the world on others disrespect their freedom to live lives they value' (*ibid.*: 264). The report subsequently advocates for a focus on democracy as the best way to ensure no trade-off between rights while ensuring the exercise of FoRB (*ibid.*). Deneulin and Shahani, therefore, focus on FoRB in its narrowest sense, failing to consider, among other things, the legitimate

restrictions on FoRB in Article 18(3) and its place within the wider human rights framework. Petersen (2020: 12–13) clarifies that ‘there is no inherent contradiction between rights related to FoRB, gender equality’ and other rights, and FoRB can ‘never be used to justify the human rights of heterosexual women, girls and [sexual orientation and gender identity] SOGI minorities’, for example. The perception that advancing FoRB risks undermining other human rights and related wellbeing is not uncommon in non-religious development spheres.

Beyond this work, religion, let alone FoRB, as a dimension of human development and wellbeing, has gained little to no traction in non-religious development spheres. UNDP’s Human Development Index (HDI) (UNDP n.d.a.), the primary statistical composite providing indicators of human development, continues to focus on ‘life expectancy’, ‘education’, and ‘per capita income’ as indicators of human development. These more quantifiable dimensions of human development, however, miss other relevant dimensions of human life, choice, and wellbeing, including the more invisible ability to practise one’s religious or belief identity. This ability cannot be captured through the limited categories listed. Disaggregation of ‘gender, regions, races and ethnic groups’ has reportedly been ‘widely’ carried out for policy formation (UNDP n.d.c.) but disaggregated data on religion or belief, which is needed for FoRB, and not substitutable with ethnicity, is absent. The UN Special Rapporteur on Racism (UNGA 2015) also notes that national aggregates of the HDI alone are insufficient for capturing inequalities that render the most disadvantaged in society visible.

The Legatum Institute’s (2020) global Prosperity Index, for example, consists of 12 pillars of prosperity, factors of which include ‘personal freedom’ and ‘wellbeing’. The ‘personal freedom’ prosperity pillar specifically includes indicators on FoRB, recognising the importance of this element of human development. Capturing some of these more invisible and visible dimensions of human choice and wellbeing would help provide a more comprehensive picture of human development and better enable related objectives to be reached. At present, this remains a gap in the human development framework.

#### 4.4 Human rights-based approach

The ‘human rights-based approach’ (HRBA) emerged as a new development paradigm in the late 1990s ‘when two hitherto distinct strands of foreign assistance and global policy – human rights and development – began to merge, combining the principles of internationally recognised human rights with those of poverty reduction’ (Kindornay and Ron 2011: 4; Darrow and Tomas 2005). Here, rights-based experts began urging development practitioners to assess human rights conditions – which, if done comprehensively, would include FoRB – before formulating their plans and projects (*ibid.*). This involved identifying ‘rights-holders’ and ‘duty-bearers’ in prospective projects; ensuring local participation in projects start-to-finish; strengthening accountability mechanisms, and, so, reducing discrimination against marginalised groups; focusing on development processes in addition to outcomes; and engaging in advocacy efforts. The Danish Institute for Human Rights (DIHR) (2020: 12) states that an HRBA to development ‘fundamentally shifts the core mission of

development [...] by integrating human rights norms and principles into every area of development cooperation, including the process itself, and in every thematic area of work'. In its HRBA to development reports, however, the DIHR (2020; Boesen and Martin 2007) only mentions FoRB in relation to the human rights framework, and mentions religion in passing as part of a list alongside other discrimination grounds.

There is a similar story elsewhere. The UN Office of the High Commissioner for Human Rights' HRBA to development cooperation report (OHCHR 2006) and UNICEF's (2012) Global Evaluation HRBA Report mentions religion only in passing as part of a list of protected characteristics. WHO, UNFPA, and others' HRBA Approach to Health Guide (OHCHR *et al.* 2016), makes no mention of religion or belief, despite the role of religious groups in providing health care. Despite professing to have profiled a comprehensive range of topics, the UN's **HRBA portal** (UN HRBA n.d.) has no focus on religion, unlike other identity markers such as disability, gender, age, and other economic, social, or cultural rights. While Act Alliance's important *Rights-Based Development from a Faith-Based Perspective* position paper (Aprodev *et al.* 2015: 9) provides a potential opportunity for 'religious freedom' and related inequalities to be linked, 'religious freedom' is only mentioned as a consideration within faith-based development work and is not linked to an HRBA to development.

In theory, the growth in attention to an HRBA sounds positive for the integration of FoRB into development work and, as Kindormay and Ron (2011: 4) state, 'should entail a substantial shift in development practices. The empirical reality is still unclear and in flux, however'; not least for the role of FoRB within an HRBA to development which the UN Special Rapporteur for FoRB's UNGA report advocates for (UNGA 2020). Tomalin's (2006) paper *Religion and a Rights-Based Approach to Development* highlights that the lack of consideration of religion-related rights means that significant indigenous mechanisms and partnerships for pursuing rights-related development objectives have been overlooked. The discussion in Tomalin (2006: 93) and Deneulin and Shahani's (2009) papers, of how 'religious traditions have often acted against the pursuit of human rights' points, however, to a commonly held concern, likely explaining why FoRB remains conspicuously absent in HRBA work.

#### 4.5 Horizontal and vertical inequalities

Stewart's (2005, 2008; see also Baghat *et al.* 2017) pioneering work on horizontal inequalities provided a sub-section of the inequalities framework within development. This accommodated a novel consideration of religious and ethnic minorities' collective experience of marginalisation and its relationship to violence. Her 2005 work distinguishes between vertical and horizontal inequalities, the former being inequality experienced among individuals or households (income, education, health, and so forth), and the latter defined as inequality among groups, typically culturally defined by religion, race, ethnicity, and other factors. Stewart notes that the group dimension is intended to be added to the individual one, not to replace it. Improving the wellbeing of deprived groups is, therefore, justified because it can improve individual welfare.

Horizontal inequalities are inequalities in economic, social, or political dimensions or cultural status between culturally defined groups that serve to ‘bind them together’ (Stewart 2007: 21). Stewart, Brown and Mancini (2010) note that although people have many identities, some of which are fluid, religion, gender, and ethnicity, for example, are more permanent and significant personally. Horizontal inequalities, therefore, affect individual wellbeing and social stability in a serious and different way to consequences of vertical inequality, and can significantly increase the likelihood of conflict (Stewart 2005). Stewart (2007) contends that it is not the case that there is an unavoidable ‘clash of civilisations’ (Huntington 2002) and that those with religious, cultural, and other differences cannot live together peacefully. It is the existence of major horizontal inequalities and subsequent grievances that causes conflict (Østby 2013). Conflict involving religion and non-religious ideology is found to be longer and of higher intensity (Basedau *et al.* 2011: 8).

Vertical inequality is beginning to be recognised as a problem (Cornia 2004; UNDP 2005; Wagstaff 2005) due to a significant focus on poverty reduction and economic dimensions in development work, and because high and growing vertical inequality makes poverty reduction more difficult (Stewart, Brown and Langer 2008). Even so, vertical inequalities have received relatively little policy attention, and horizontal inequalities even less so, as evidenced by the UN Department of Economic and Social Affairs’ *World Social Report 2020* (UNDESA 2020). Although group boundaries become endogenous to experiences of inequality, in that people may feel a stronger cultural or other identity-based communal affinity to inequalities being experienced, Stewart (2010) argues that cultural and other horizontal group constructs do matter to people.

Even though Stewart (2010: 3) highlights research findings that ‘violent conflict is more likely to occur in areas with relatively low levels of economic development and greater religious polarization’, attention to religious or belief-based horizontal inequalities (i.e. relating to FoRB violations) is particularly marginal. Work that engages with intersecting inequalities, such as the UN Economic Commission on Europe’s 2013 report (UNECE 2013), UNDESA’s (2013) *Inequality Matters* report, and the 2016 *World Social Science Report* (UNESCO 2016) ‘typically frames religious inequality as a possible compounding factor, but no examples of how religious inequality interacts with (and reinforces) other inequalities are given’ (Tadros and Sabates-Wheeler 2020: 42).

Basedau *et al.* (2018b), Marshall and Van Saanen (2007), and Martin (2008) do specifically analyse how religious identity exacerbates inequality in relation to access to the labour market, housing, and health care, but such examples in a development space are rare. Basedau *et al.* (2017) also note that data-gathering and analysis processes make it difficult to observe how inequalities come about on the basis of religion. Discussion on the intersection of religious inequalities with other inequalities (for example, gender) and related rights violations is almost non-existent in development approaches and literature, despite, for example, the work of Petersen (2020), Tadros (2020), and the UN Special Rapporteur’s (UNGA 2020) attempt in his annual UNGA report, to unpack the relationship between religious and gender inequalities, for example. **UN Women’s Briefing**

(UN Women n.d.) highlights that faith and related issues have been asked to be 'left outside' when structural determinants of gender inequality in development contexts are being negotiated.

Analysis on religion in development work, let alone non-religious dimensions that would form a necessary part of inequalities based on FoRB violations, remains relatively marginal. Religion is primarily subsumed as a sub-category under 'culture'. For example, a paper by the leading voice on horizontal inequalities, Stewart (2009), on horizontal inequalities experienced by Muslims frames their religion or belief as a component of their culture. Due to this, and the framing of religious (and consequently belief) groups' experiences as largely homogenous, important aspects of FoRB violations and subsequent religious inequalities experienced are missed.

For example, a person's religion or belief is not always synonymous with their culture; people may convert or choose to hold and practise beliefs at odds with what their wider cultural understanding is perceived to be. A person may self-define 'culturally' as Muslim, for example, but has to hide their atheist beliefs. A focus on culture also tends to lead to an aversion to framing religious inequalities through a FoRB lens with a common generalisation that invoking FoRB allows harmful cultural practices to be defended (Abdulla 2018).

Religious or belief inequalities are also not always experienced homogeneously within a certain religious or belief group, because religious or belief groups are not homogenous. The religion or belief someone holds and religious inequalities in a particular context do not inherently mean economic exclusion and poverty, for example. Peoples' intersecting identities and the subsequent inequalities experienced lead to different experiences of horizontal inequalities by different people within that religious or belief group. Differences in religious or non-religious beliefs within a religious or belief group, as well as wealth, education (vertical inequalities), geography, age, language spoken, perceived ethnicity, and other factors, further impact how intensely or systematically religious inequalities are experienced by individuals.

Although FoRB violations, such as discrimination or restrictions in law towards a specific religion or belief group (producing religious inequalities), may apply to a whole group, the law may not be felt equally across the religious or belief group due to the identity markers above. For some, the legal restrictions that apply to people of their religion or belief may not be felt at all due to their income, particular beliefs, or other factors. All of these experiences are, nonetheless, experiences of religious inequality, despite their differences. Although some conceptualisations attempt to undermine FoRB's universalism (Bielefeldt 2013), a FoRB-sensitive lens can help work with these nuances because it relates to the individual and sits within a wider human rights framework that pertains to different parts of human identity and experience.

#### 4.6 The SDGs

As acknowledged above, FoRB plays an important role in the realisation of Agenda 2030. It identifies the particular challenges related to religious or belief discrimination and inequalities. It points to their possible solutions,

provides a valuable contribution to the commitment of Agenda 2030 to ‘reach those furthest behind first’, and directs attention to these issues in broader development, human rights, and peace-building efforts (Petersen 2020). The UN Special Rapporteur’s report for the 75th UN General Assembly (UNGA 2020) comprehensively demonstrates the ways in which FoRB and violations of this right relate to and impact the SDGs. The topics on which this chapter demonstrates links with FoRB include security of tenure, health, hunger, and clean water and sanitation, education, violence, and legal identity in relation to SDGs 1, 2, 3, 4, 6, 10, and 16. The Special Rapporteur’s report (*ibid.*) also provides an indicator framework to help identify where inequalities relating to FoRB dynamics impact the realisation of the SDGs in any given country.

Within development spaces, the case for the usefulness of considering the role of religion and religious partnerships for achieving the SDGs has been acknowledged. For example, a new version of the UN IATF, the UN Interagency Task Force on Engaging Religion for Sustainable Development, has played a role in bringing faith actors into the new SDG process (Karam 2016), including through an event in the SDG stakeholder consultation (SDG-Open Working Group) process. This body has supported joint activities across UN agencies, including engagement with faith-based organisations in the UN system and various countries. Where this engagement allows religious inequalities to be raised by religious and faith-based actors, it is not framed through FoRB *per se* (Tomalin, Haustein and Kidy 2019). Some participants have debated the visibility of faith actors and opportunity to discuss anything ‘religious’ in these processes (Haustein and Tomalin 2019; Tomalin, Haustein and Kidy 2019).

Equally, faith-based actors are concerned that engagement with them is tokenistic and through the narrow basis of their religious or belief identity. Ten Veen (2020) and others have also emphasised the added value of a faith-inspired approach to the SDGs, which allows them to be made more relevant and engaging for people in different country contexts. Efforts in this vein are, however, fledgling and have not been integrated into any concrete SDG pursuits. For all the reasons mentioned above in relation to approaches to religion in development work, engagement with faith actors and religious considerations in SDG work are not inherent proxies for applying a FoRB lens.

An absence of FoRB and related considerations in this SDG-related work is seen within the SDG framework itself through the relegation of any mention of anything to do with religion – here religious inequalities’ only mention is in indicator 10.2, where it is listed as one of many characteristics. No further SDG indicators or even proxies for measuring SDG progress mention religious inequalities.<sup>4</sup> Although not much is immediately known about what was discussed privately in the development of the SDGs, it is unlikely that this is coincidental, and that deletion of FoRB-related considerations was deemed preferable for securing some level of immediate progress rather than keeping in an intensely controversial topic such as FoRB and subsequently religious inequalities. The relegation of FoRB-related considerations is consistent elsewhere: UNDP’s (2018) paper and framework for SDG implementation lists religion alongside other

characteristics and the UN SDG Report (UN 2020) only mentions religion in relation to gender discrimination.

There is no evident exploration of FoRB specifically within a mainstream development SDG space, and particularly, nothing operationally in programming and policy where FoRB and related religious inequalities are an integrated consideration. This lack of attention to discrimination and inequalities on the grounds of religion is not only a blind spot in Agenda 2030 but mirrors blind spots in development and peace-building (and human rights) efforts more generally.

#### 4.7 FoRB in development approaches

There are some exceptions to the rule with a few initiatives in development spheres that have started to work on freedom of religion or belief directly, or through related concepts such as religious inequalities.

A significant number of development academics and practitioners have started to recognise faith and belief as an important paradigm to integrate into their work. The German Federal Ministry for Economic Cooperation and Development (BMZ)'s (2017) *Voices from Religions on Sustainable Development* report is one of many development spaces that have started to welcome religious voices. From 2005–10, the UK government funded a Religions and Development Research Programme at the University of Birmingham (n.d.) which produced dozens of papers and policy briefs on this intersection. Exploration of integrating religious and FoRB considerations in development programming is underway in Norway (Øyhus 2016) and Denmark through the Danish Mission Council Development Department (DMCDD n.d.). Leisinger (2014), Ulluwishewa (2018), and others have also advocated for the related consideration of people's spiritual aspirations within development work.

Basedau *et al.* (2018b), Marshall and Van Saanen (2007), and Martin's (2008) analyses of institutional discrimination – which produces religious inequalities – in the labour market, housing sector, and health sector respectively, are welcome precursors to the more systematic links made by the UN Special Rapporteur on FoRB's UNGA (2020) report. PaRD (2019a) has, for example, brought stakeholders across peace-building, development, and FoRB spheres together to discuss advancing FoRB through development work. Other such analysis within development literature is, however, scarce or non-existent.

There is also a shift at the state development funding level in a few countries to work on FoRB. The advocacy for this arose from concepts related to foreign policy objectives and did not come from within development bodies themselves.<sup>5</sup> States within the US-led Alliance on Religious Freedom (US Department of State 2020), have, for example, supported a focus on 'marginalised religious minorities in development assistance'. FoRB academics Grim and Finke (2010: 61) and Gill and Shah (2013: 26), for example, advocate that 'religious freedom' is 'a key ingredient to peace and stability and thus environments for economic growth' and 'crucially contributes to promoting stable democracies, from which economic growth follows'. USAID has framed its FoRB-specific work (USAID 2020b) through 'its support for advancing democracy' which includes a 'foundational rights focus' including religious liberty and freedom

from discrimination, embodied in the US constitution and law. Aside from concerns from Durokifa and Ijeoma (2018) and others, that promoting democracy within development is perceived by some as neo-colonial, the translation of FoRB from foreign policy to development objective-relevant remains rudimentary. FoRB and related considerations have, therefore, not been mainstreamed in state development work.

USAID (2020b) lists its work in various countries to prevent further FoRB violations and redress religious inequalities experienced by religious groups. The primary focus of FoRB-specific work by state development agencies here remains on identifying specific geographically limited FoRB violations and seeking to redress their specific outcomes or symptoms (USAID 2021b). There is less emphasis on utilising a FoRB-sensitive lens to engage with religious and intersecting inequalities at a structural level, and to seek to identify their root causes and drivers, which helps reduce and prevent further FoRB violations and related inequalities. Where this is done, it is at best on a time-limited *ad hoc* basis. It is also not clear that FoRB itself is being pursued as part of the measures to address any religious inequalities identified. Where this is done, attention must be paid to ensuring that support of one religious or belief group is not at the expense of another, which can risk breeding grievances.

Where there has been an openness to mainstreaming a FoRB-sensitive lens in development work in the UK, US,<sup>6</sup> and elsewhere, programmes are in their exploratory phase and are not yet incorporated into wider development programming. The Coalition for Religious Equality and Inclusive Development (CREID) is implementing projects in Iraq, Syria, Egypt, Myanmar, and Pakistan to practise and learn from incorporating FoRB into development in practice. The Dutch government has also funded the Joint Initiative for Strategic Religious Action (JISRA) coalition of development and peace-building organisations to engage in a bottom-up societal advancement of FoRB through locally legitimated language and processes in seven countries (Tearfund 2020). The 2019 EU Global Exchange Platform (2019) for Religion in Society also funds peer-to-peer exchanges between EU and non-EU religious and non-religious practitioners working to build inclusive societies and address religious and related inequalities within the context of the SDGs. The FoRB framework is consciously not referenced, however, with a likely ambition to appear legitimate to partners in the global South and EU alike.

Despite the advocacy for an HRBA within a development context, evidence of work documenting the incorporation of FoRB in development approaches remains scarce, and in practice, to date, almost non-existent. A 'literacy' of FoRB's ability and means to uncover and address religious and intersecting inequalities and to be 'rooted in every cultural context' (Bielefeldt 2000: 100) is needed. Those working in development spheres, including on fragile contexts (for example, the OECD's *States of Fragility 2020*), as well as related spheres, including human rights and peace-building, would be better supported and enriched through such a 'literacy' grounded in global perspectives. Developing methodologies and processes for integrating FoRB into development work requires deep listening to people in different contexts with their complex intersecting identities in

mind, as well as listening to development practitioners' existing wisdom and concerns. This has not, as yet, started in earnest.

## 5 The peace-building context

### 5.1 Approaches to religion within peace-building: negative, positive, and Justpeace

A FoRB lens has a lot to offer peace-building. It helps ensure that religious inequalities as well as their root causes – including those related to the more invisible beliefs about 'the other' – are identified and considered in 'conflict mapping', and responded to as part of a more comprehensive response. A prevailing 'ambivalence' towards 'the sacred' or religion (Appleby 2020) has, however, helped prevent a FoRB lens from being practically integrated within peace-building. This section explores the relationship between FoRB and peace-building, providing hypotheses towards this ambivalence, and analysing the instances where we do see a degree of intersection between the disciplines.

At the sharp, practical end of peace-building, the role of religious institutions and people's related identities in driving conflict is witnessed often. Despite advocacy that religion is a prism through which peace can be inspired, the legacy of religious violence throughout history has helped cement the prevailing stance towards the topic of religion in peace-building as one of ambivalence. With reference to Østby (2013), Omoeva and Buckner (2015), and others' work, the United Nations and World Bank's (2018: xviii) seminal report *Pathways to Peace*, seeks to comprehensively outline routes for reducing conflict in the context of the SDGs, and notes that group inequalities, including religious and intersecting inequalities, create 'fertile ground for grievances' and act as a 'mobiliser for conflict'. Because of its connection to religion and religious violence, the right to FoRB is, in turn, still widely perceived as a tool to protect harmful religious beliefs and practices that undermine peace by mobilising conflict.

FoRB is therefore, for the most part, missing from the conversation within the peace-building sphere, and is widely overlooked or dismissed.

The 'negative' peace approach in peace-building seeks the absence of violence with a focus on reducing the 'hot' violence or acts that impose immediate harm on a group (Galtung 2011). By isolating these acts, negative peace-building approaches are themselves isolated and unrelated to societal structures and culture, and so do not consider religion, beliefs, or related inequalities. 'Positive peace' focuses on 'structural violence' which includes analysis of the 'suffering caused by economic and political structures of exploitation and repression' and 'cultural violence that legitimises direct and/or structural violence' (*ibid.*).

'Justpeace' intentionally combines positive peace-building methods with building and transforming sustainable relationships through alignment with relevant norms among conflicting sectors and cultures to prevent direct and structural violence (Lederach 2017). Although the 'Justpeace' originator, Lederach, engages specifically with religious identity in his work (2015), positive peace and Justpeace's framing has tended to subsume FoRB under 'culture' more broadly. This risks missing the different identities and experiences of people within a religion or belief community. These different identities and experiences have also been missed due to the

tendency within peace-building to engage with religion and related issues no more than at a homogenous collective or institutional partnership level rather than through a FoRB lens which focuses more on humans' religious or belief identity and subsequent experiences.

Peace-building literature and practice reflect the ambivalence within the field as to whether religion, and by extension FoRB, is helpful or disastrous for negative or positive peace-building approaches. Philpott (2013: 36) advances that the largely secular space within which peace-building theory and practice has developed, has led to religion being regarded either as 'irrelevant', or at worst, 'inherently violent and divisive'. Silvestri and Mayall (2015: 1) echo that religion's role in conflict and peace-building has 'all too often been depicted in binary terms', as either 'a source of violence or reconciliation'. Kofi Annan's 2016 speech (Kofi Annan Foundation 2016) in which he states that 'religion has been a driving force for [personal and] social progress' but also 'instrumentalised [to exclude], to persecute and even to kill "the other"' reflects this. The *Journal on Religion, Conflict and Peace's* authors Ensign and Karegeye (2018) and others, do not attempt to disentangle the positive or negative role of religion, or move beyond balancing different perspectives within the field. The World Faiths Development Dialogue (2017) notes in the practical context of Nigeria, for example, that although it is known that religion shapes social dynamics and norms, there remains little consensus on its role or importance.

The contribution of religion in 'crystallising peace' (Durham and Clark 2015: 281) is increasingly raised by FoRB advocates and peace-building academics and practitioners alike. Toft, Shah and Philpott (2011: 9) advocate the 'opportunities posed by globally resurgent religion', Omer (2015: 3) encourages 'reconsidering the presumed unidirectionality of religion in peace-building', and Cahill (2019) encourages the discovery of the historic roots of peace-building in Christian traditions to unlock its potential today. In 2006, the United States Institute of Peace's (USIP) (2006: 1) Religious Contributions to Peacemaking noted the maturing explication of religion's role in peace-building, especially through the 'strong warrants for peacemaking in the Abrahamic faiths'. USIP (2018: 7) cites examples of the Israeli–Palestinian, Sudan–South Sudan, and Sri Lankan conflicts, claiming that 'neglecting or simplifying the role of religion may in some cases have led to an escalation of religious opposition on both sides of the peace process'. Religions for Peace (RfP 2020a, 2020b), the Parliament of the World's Religions (2019), and many others continue to advocate for peace through the voices of religious leaders who condemn violence in the name of religion.

Despite these efforts, very few substantive analyses of faith-based conflict prevention paths and techniques in academic literature exist. The exceptions include Bouta, Kadayifci-Orellana and Abu-Nimer (2005) and Hertog (2010), who explore the 'peace-inculcating values and ethics of religion' and their potential for violence prevention. Palihapitiya (2018) also considers faith-based early warning systems which inherently involve the analysis of tensions based on religion or belief and related inequalities, and thus the application of a FoRB lens, within a context. Beyond such exceptions in literature, the ambivalence towards the role of religion or

belief in peace-building, especially in practical approaches, means that a FoRB lens is not applied in conflict or pre-conflict settings.

Some peace-building academics and practitioners even specifically acknowledge and engage with religions and related identities in conflicts but fall short of integrating FoRB as an approach. Malik's (2009) analysis of conflict in Pakistan, Fagbemi (2013) and Search for Common Ground's (2020a) engagement on conflict in Nigeria, and K4D's analysis of conflict in Iraq (O'Driscoll 2018) are examples of this. Despite this analysis and engagement, FoRB, as a framework, is not engaged with or referenced in this work. Generations for Peace's conflict mapping in South Sudan (Morrow 2014), South Ossetia (Beswick 2014), and North Macedonia (Awad 2020) even advance religion as an influential factor in people's identity and the conflict but do not explore the religious inequalities experienced that result from FoRB violations. Interpeace's 2019 and 2018 annual reports investigate gender and youth inequalities but only consider religion or belief in relation to religious leaders' inclusion in high-level meetings rather than in relation to inequalities experienced.

Applying a FoRB lens to a conflict setting involves identifying the role of religious or non-religious belief identity in driving, exacerbating, and prolonging conflict. While some research and theory on conflict in the social sciences does engage religious or belief identities, FoRB-related religious or belief inequality dynamics in driving conflict are often overlooked (Grim and Finke 2007).

When religion or belief-related inequalities are identified within conflict settings, the focus overwhelmingly homes in exclusively on the role of socioeconomic or political factors as drivers in the conflict. The role of religion or belief in a conflict is widely perceived as 'emanating from social conditions that foster a corrupted version of religion' (Juergensmeyer 2003: 283). The social conditions are therefore perceived as the real issue to analyse and address, and neglects the important dimensions to a conflict that applying a FoRB lens would uncover. The United Nations Secretary-General (2018) reflected, for example, that 'religious conflicts are normally the product of political or geostrategic manipulation or proxies for other antagonisms'.

Due to the secular framework through which peace-building theory and practice has developed, even peace-building organisations with faith-based roots, who are well placed to be sensitive to FoRB dynamics, may also follow a narrow secular socioeconomic line of analysis and engagement that overlooks religious or belief inequalities. The Christian International Peace Service (CHIPS n.d.), for example, does not incorporate religious or belief considerations into their work, instead focusing on socioeconomic support.

Where **religious identities** are considered within peace-building literature or approaches, they are sometimes subsumed within ethnic identities. The conflict analysis and responses then focus on ethnic dimensions of the conflict which may exclude religious or belief particulars. This is evidenced in Rohwerder's (2014) engagement on the Iraqi conflict where tensions that risk further conflict between Sunnis and others are raised as 'ethnic', and Belgioioso's (2014) engagement, as part of Peace Direct's 'Peace Insight', with the targeting of Rohingya in Myanmar as an 'ethnic group' having experienced 'ethnic cleansing'. While ethnicity and

religion or belief can be closely related, and for some people mean one and the same thing, one does not always equate to the other. Religion or belief and the subsequent inequalities and violence experienced can, for example, be more fluid than those felt on account of one's ethnicity.

The United Nations (UN) and World Bank's *Pathways to Peace* (2018: 122) acknowledges that 'having a greater sense of purpose and sacrifice for a transcendental cause' can be a driver of conflict but goes on to say that this FoRB-related driver arises from a 'lack of religious literacy'; that is, a corrupted version of religion. The advocacy of religion as 'inherently peaceful' and religious-driven violence as stemming from a 'corruption of religion' is further echoed in the UN Counter-Terrorism Committee (2014) and other counter-terrorism circles (Mandaville and Nozell 2017).

Our thoughts, conscience, religion, or beliefs (which FoRB engages with) shape our experiences and needs and inform whether we partake in violent action in the world. An exclusive socioeconomic focus misses these less-seen religious or belief elements that play an important role in a conflict. When a FoRB lens is side-lined, the analysis and subsequent solutions are built with blind spots in attempts to comprehensively understand and respond to the conflict in question.

## 5.2 Working with faith or belief-based actors for peace (positive and Justpeace)

Working with faith-based actors, leaders, and laity alike (Hayward and Marshall 2015), as **conduits of peace**, has been increasingly discussed and advocated for in peace-building and FoRB literature and approaches (see, for example, USIP 2018; Religions for Peace (RfP) n.d.; USAID 2009; PaRD 2019b; Nicholas 2014). Religious actors' public platforms and subsequent influence to promote messages of peace towards others and 'raise the alarm as peace deteriorates' (Payne 2020: 8) means that they are evermore regarded as a useful resource and partners for disseminating peace. USIP (n.d.a.), for example, highlights that the absence of religious actors in official peace processes can disrupt them and UNHCR (2020b) has established a 'Multi-Religious Council of Leaders' to 'support peace-building, inclusion and reconciliation efforts'.

Positive and Justpeace approaches seek to move beyond the 'hot' violence to the structural level or deeper cultural and related triggers for the violence (Galtung 2011; Lederach 2017). For many within the peace-building world, using these approaches towards conflict with religious or belief elements means working with the religious or belief institutions that are perceived as perpetuating the structural and 'cultural' conditions for violence. Because peace-building work has tended to engage with religion and related issues at the collective or institutional level, a FoRB lens which focuses more on humans' identity and subsequent experiences is overlooked.

Faith-based actors themselves have been vocal in their ability to fill gaps in hard-to-reach communities through their networks (Watson *et al.* 2020), and 'to build resilient relationships at the local levels, model forms of prevention embedded within local culture and work with the emotional and spiritual dimensions of transformative change through their "spiritual capital"' (Payne 2020: 1). Search for Common Ground's (2016) 'Plateau Will Arise!' (phase II) programme sought, for example, to work closely with

religious leaders in Nigeria to reduce tension after identifying the conflict as ‘ethno-religious’. The EU Global Exchange Platform for Religion in Society (2019) seeks to facilitate peer-to-peer knowledge and skill-sharing exchanges between faith and non-faith actors to address conflict and related socioeconomic and political inequalities.

The UN Office of the Commissioner for Human Rights’ ‘Faith for Rights’ framework and Beirut Declaration (OHCHR n.d.) also seeks to encourage the development of peaceful societies across the globe through faith-based actors, including with specific mention to the framework of FoRB. Faith-based actors’ ability to act as partners in peace-building is now often framed within the context of SDG 16, as also acknowledged by actors working at the UN level (see TAP Network 2016). Despite these initiatives, in practice, faith-based actors’ work to prevent violent conflict remains ‘largely unexplored’ (Payne 2020: 1).

The primary paradigm that peace-building literature and approaches have focused on is faith-based actors’ **interfaith work**, which has the ability to increase understanding between individuals of different religions or beliefs through encounter which can help to reduce future FoRB violations. Interfaith work also has the ability to confront root causes of tensions, especially those touching on religious beliefs or practice (Marshall 2017). Coexister France (n.d.) helpfully approach interfaith actions as a ‘means’ to other goals, ‘rather than an end’ in itself. Marshall (2017) maps the dynamism of interfaith work from the 1983 Parliament of the World’s Religions and analyses the interfaith space before each Global G7, G8, and G20 summit.

The World Council of Churches (2018) raises churches’ positive role in acting as a unifying force between churches during the Colombian peace process. In Nigeria, Muslim–Christian dialogue initiatives, including ‘the Imam and the Pastor’ (United Religions Initiative 2019), and the promotion of reconciliation through media (USAID Nigeria 2015; USIP 2006) has been positively recognised internationally. In Iraq, the ‘importance of interfaith initiatives’ for the conflict (see Kareem 2016, UN Assistance Mission for Iraq) led to an interfaith leaders’ statement on ISIL perpetrator accountability (Security Council Report 2020). Kaiciid (Kaiciid Dialogue Centre n.d.) presents inter-religious dialogue as ‘at the heart of positive peace-building’ and the Adyan Foundation (n.d.) promotes their facilitation of interfaith citizenship education. All such work has the potential to contribute to the reduction of FoRB violations – sometimes naming this – but is not framed in this context.

The strengths and limitations of interfaith work are ever-present in peace-building literature. As well as advocating for peace, religious leaders have equally used their platforms to incite violence against others. Kmec and Ganiel (2019) discuss the strengths in including religious actors at grass-roots level, while noting the limitations when they were included in ‘track one’ negotiations during peace-building processes in Northern Ireland, and Bosnia and Herzegovina. Sterland and Beauclerk (2008: iii) highlight the ‘remarkably few faith-based or faith-led peace-building initiatives being carried out in the Balkans’ and that the most prominent attempts to stimulate interfaith peace concentrated only on establishing

formal leadership-level Inter-Religious Councils in former Yugoslavian Republic countries, with an unknown impact on the wider communities.

Christian churches were also deeply implicated in the 1994 Rwandan genocide, and due to the Church's support for the state regime, churches became massacre sites rather than interfaith dialogue spaces (Longman 2001). In Sierra Leone, interfaith cooperation helped broker peace between the government and the rebels, but religion was also used as an instigator and justifier of violence (Conteh 2011). Due to their unknown quantity for promoting peace or violence in many conflict settings, therefore, many in secular peace-building spheres remain cautious about working with faith-based actors.

While interfaith dialogue and other initiatives with religious actors are important for peace-building in-country, they are often undertaken detached from considerations of FoRB violations and their impact on religious and intersecting inequalities in that context. This work – pluralising a peace-building space with different religious actors – does not inherently or by proxy mean that FoRB is being pursued or achieved: one does not inherently lead to the other. One must also be wary of symbolic interfaith gestures that are made without real personal and local ownership and purpose.

These actions may deflect from engaging with the real beliefs around an issue or incident and are consequently counter-productive in the short term. Interfaith initiatives involve a focus on understanding, deep listening to, and working with individuals who hold differing religions or beliefs. These initiatives can help significantly reduce tensions and the likelihood of violence based on religion or beliefs. Interfaith work does not, however, inherently facilitate internal nurturing of peace in which individuals' insecurities and needs that drive conflict are addressed, nor guarantee that the violent targeting of people based on their religion or belief will not occur when certain socioeconomic and political inequalities give rise to grievances.

There are also limitations to the extent of the work that can be done to redress inequalities and subsequent grievances through interfaith work. Interfaith initiatives that only work with (self-nominated) religious leaders support those more used to access to power and voicing their needs. It does not guarantee that the message of peace communicated to members of the religious leader's community be received by all within the community, especially by those with minority intersecting identities.

Interfaith work has typically expected participants to declare a religion as 'a condition for entry' which often implies 'working through established channels of religious leadership in ways that may exclude' diverse members of that community (Griffith-Dickson *et al.* 2019: 9). It is impeded by the 'interfaith identity paradigm' which 'focuses on concretised religious identities through a confessional model' which ignores intersecting identities and encourages each person to 'represent' their religious or belief institutions (Shoemaker and Edmonds 2016: 200). FoRB reminds us to step beyond binary religious categorisations of people in interfaith work, and to bring everyone within a perceived religious community to the table in peace-building processes such as sustained dialogue. FoRB also reminds us in such processes to keep people's religious or belief identities in mind,

but in the context of people's intersecting identities. FoRB also more easily accommodates non-religious subject positions and diverse members of a nominally homogenous religious community, which helps prevent interfaith work from being relegated to the 'religion corner' (Tomalin *et al.* 2019: 13) in peace-building processes.

Because no religious or belief community is homogenous, a FoRB lens in peace-building, which inherently helps recognises the diversity of thought, conscience, religion, or belief between individuals, reminds us to try to bring everyone (perpetrator and victim) to the table to voice their grievances and needs. This includes those with different thoughts, conscience, religion, or beliefs within the religious communities who are often less heard due to their intersecting identities. This allows common understanding and practical solutions to be better identified from a more holistic perspective. When conflict mapping, FoRB 'right-sizes' the role of religion or belief in a conflict, neither exaggerating nor ignoring the role of thought, conscience, religion, or belief identities, in conflict or building peace. Integration of FoRB considerations does not inherently expect 'harmony' as an outcome. FoRB inherently permits disagreement to remain in regard to what 'truth' is, necessitating effort and practical steps by all to live respectfully of each of our (human) rights.

### 5.3 Peace-building through the *forum internum*

Guidance on and support for a person's own spiritual work and development, to build peace from the inside out (Hoffman 2019), plays a significant role in reducing the drivers for conflict within people after they experience or perceive (intersecting) inequalities that give rise to a sense of injustice or desire to maintain their *status quo*. Lederach (2015: 541), the father of the Justpeace approach, recognises the usefulness of 'spiritual resources that facilitate peace-building in protracted conflict' and the need to 'explore inner and outer worlds to forge the moral imagination necessary to [...] remain open with others amid conflict'. Transformative change in the internal dimension (*forum internum*) of a person is less about faith or belief-based actors instilling institutional religious positions or beliefs and is more about facilitating personal and inner conflict transformation related to insecurities and needs (Guest 2007; Heelas 2002; Redekop 2014). Three-time Nobel Peace Prize nominee Elworthy's *Business Plan for Peace* (2018) outlines that inner development is essential for people to be effective conduits of peace in conflict settings, an approach supported by many analysing the cognitive dimension of peace-building, including Plus Peace (n.d.), Feet-on-the-Ground (n.d.), and Beyond Conflict (n.d.).

Faith leaders and their communities have been active for centuries, alongside reconciliation and peace-building practitioners today, in building inner peace within people through what is conceptualised as 'spiritual capital', just as much as they have been in inciting violence against others. The latter is often focused on, in part reflecting on the scarcity of initiatives or literature advocating this work with faith leaders. There is indeed an important positive role for faith actors in this work, especially at the grass-roots level (Kmec and Ganiel 2019), but this is only exceptionally recognised. Taliep *et al.* (2016: 331), for example, examine how religious leaders in Apartheid South Africa

mobilised their ‘spiritual capacity and resources to resist and fight against state and structural violence during the 1970s and 1980s’.

FoRB protects our *forum internum* – i.e. our thoughts, conscience, religion, or beliefs – which heavily influences whether one participates in violence, but also justifies limits to this right when it violates the fundamental rights of others.<sup>7</sup> Peace-building must, however, also deal with our *forum internum* which is where our inner conflict that drives our actions and is a natural part of the human experience, takes place (Redekop 2014). FoRB engages with our *forum internum*. Because this *forum* shapes our egoic sense of self in comparison to others, and with conscious guidance, this is also where personal inner transformation occurs. This transformation is both critical for bringing the peace that peace-builders seek (*ibid.*: x), which subsequently helps realise FoRB. While interfaith work can influence inner change, it typically focuses on understanding ‘the other’, rather than strengthening one’s capacity to understand one’s own needs and reacting peacefully to subsequent emotions. The latter frees us up in crises to see the humanity in the other and move into a space between ‘right and wrong’, beyond the need for violence.<sup>8</sup> The principle of FoRB for all, not just those we agree with, supports this. Former Commonwealth Chief Rabbi, Lord Jonathan Sacks’ *Not in God’s Name* (2015) sets out a roadmap for the personal transformation needed from inner to external peace in the context of religious violence.

USAID (2009: 6) advocates that values learnt from religious or spiritual texts and teachings, including forgiveness and reconciliation, can ‘inspire communities to change attitudes and actions at a basic level and transform worldviews at a deeper level to understand “others” in the conflict positively’. The Centre for Peacebuilding and Reconciliation (2011) in Sri Lanka, for example, works through religious and non-religious facilitators alike to facilitate extensive intra-faith groups’ exploration of their own inner drivers of conflict through their thoughts, conscience, religion, or belief through texts, teachings, and discussion, before interacting with different religious or belief parties in the conflict. Action plans are built through intra-faith reflection which consolidates learning to sustain inner peace and resist temptations to react violently. Development Initiative in West Africa’s work in Nigeria (DIWA n.d.) reflects this ‘inner’ to ‘outer’ bridge-building model also. *Mensen met een Missie* (2019a), *Search for Common Ground* (n.d.), and other partners in the Joint Initiative for Strategic Religious Action (Tearfund 2020) recognise that going ‘one layer deeper’ than knowledge exchange to behavioural patterns and change is necessary for peace-building between religious or belief communities.

Aware Girls (n.d.) in Pakistan also approaches its peace-building through trained youth networks which facilitate inner reflection and exchange for those contemplating militancy. The Centre for Peace and Conflict Studies in Cambodia and related practitioners, Fitzduff and Williams (2018), purposefully facilitate space for nominally intra-faith groups to explore their identities and needs before exploring those of ‘the other’ in interfaith spaces. For those in conflict settings globally, Bramsen and Poder (2018) and others advance that this ‘deeper’ inner engagement is important for conflict transformation and peace-building processes to be perceived as beyond ‘government agendas’ (Payne 2020: 10). Peace Direct

(Vernon 2019) also importantly recognise the importance of communities reflecting on and developing their own processes, which is an important part of this facilitation and ensures it remains culturally relevant and legitimate.

These examples of peace-building practice, primarily outside ‘the secular West’, exemplify this helpful approach of developing peace within our own thoughts, conscience, religion, or beliefs, which helps prevent harm done to those whose *forum internum* may differ. This work has not as yet specifically been linked to FoRB or relayed back into peace-building policy and practice by peace-building practitioners or FoRB advocates. Different peace-builders have approached religion, and consequently, FoRB, within peace-building differently – with ambivalence, wariness, and on rare occasions, with constructive engagement. A more comprehensive analysis of intersecting inequalities and subsequent conflict through the prism of FoRB, and integration of the findings into peace-building theory and practice (allowing space for thoughts, and so forth, across the community to be heard) would be useful for peace-building in different country contexts.

#### 5.4 FoRB in peace-building approaches and practice

Peace-building literature and approaches have engaged much more frequently with religious inequality issues (and subsequent conflict) than their counterparts in the field of development. Religious conflict and inequalities are common dynamics within the country contexts that peace-builders analyse and engage with. While there is some increasing attention on FoRB specifically within peace-building theory, it remains conspicuously absent from much peace-building literature and theory, and falls through the cracks in practice.

Philpott’s seminal work in 2013 highlighted that ‘peace-building and religious freedom hardly seem to know each other’ (2013: 31). Gaps in integrating FoRB in peace-building and vice versa exist in both fields. Few FoRB scholars, practitioners, or officials have themselves made connections between FoRB and building peace. Some of the exceptions include Grim and Finke (2010), and Durham and Clark (2015: 282) who emphasise that ‘without FoRB, no society can be fully just, meaning processes aimed at building lasting and stable peace are necessarily incomplete’. Saiya (2015: 369), for example, applies a FoRB lens to conflict databases and case studies and identifies that ‘a current increase in State and communal religious or belief restrictions and hostility’ is ‘intertwined’ with an increase in ‘resistance on the part of believers’. In other words, increased FoRB violations in the countries he analyses have led to greater conflict.

Counterintuitively, Henne, Saiya and Hand (2020), find that state-favoured religious or belief communities are emboldened to commit violence or suppression, reinforcing the importance of dismantling such favouritism through FoRB. Through data analysis of religious terrorism, Saiya’s (2018) *Weapon of Peace*, advocates that peace requires moving beyond a focus on the voices in every religion or belief who justify violence using their beliefs, to counterintuitively reduce control and suppression of religion by protecting greater FoRB.

From a historical perspective, Chua’s *Day of Empire* (2007: XXI) highlights that the principles that FoRB enshrines have been critical for

the world's historic 'hyperpowers' and that their 'decline' correlated with calls for religious 'purity'. This is in part because more tolerant nations attract the best and brightest from other regions (*ibid.*). With reference to several contemporary conflicts, Philpott (2013: 31) advances that because 'religious freedom is a critical enabler of peace' and lack of religious freedom 'a demonstrable cause of violence', FoRB and peace-building are an unmade 'match waiting to be made'. FoRB has also more recently been linked to SDG 16's goal to build peace through reports including that of the UN Special Rapporteur on FoRB (UNGA 2020) and Petito (2020). These advocations, however, have been made primarily in foreign policy circles and not with peace-builders in-country, meaning insufficient engagement has taken place for understanding of the usefulness of FoRB for peace-building work.

Some peace-building theory and approaches have analysed FoRB, including as a conflict driver. Appleby (2000) and Powers (2010) consider the role of FoRB in peace-building. Appleby (2000: 226, 286) outlines some of the analytical questions that should be considered when applying a FoRB lens to a context including the context-specific balancing of different people's right to FoRB and also states that the 'internal pluralism' of religious traditions 'can enhance building cultures of peace'. Powers (2010: 339–41) outlines that for peace-building in religious conflicts, it is less about 'finding common ground on religious issues' and more about identifying the appropriate relationship between religion, politics and identity, including in a way that 'upholds religious freedom'. Other exceptions within peace-building theory include the Institute for Economics and Peace whose 'positive peace' framework (IEP 2019: 2) echoes that plurality of religious group membership can form an essential part of the 'good relations with neighbours' pillar, which is, in turn, one of the eight crucial pillars for peace (IEP 2020).

Despite this (high-level) analysis, little has collectively been done to outline how analysis of FoRB can systematically be integrated into practice across the peace-building field. In Bouta *et al.*'s 2005 study of 27 faith-based organisations working on conflict, only two working on peace-building explicitly encompass consideration of FoRB specifically. This engagement with the topic of FoRB remains at a theoretical level where FoRB is a goal to achieve. This is also the case for Search for Common Ground's approach to FoRB (2020b). There is no analysis of how FoRB is assessed, and such a FoRB-lens applied to in-country practice.

Some (non-faith-based) peace-building organisations have also engaged with FoRB and resulting religious inequality dynamics. International Alert (2020) and Search for Common Ground (2020b), for example, recognise the importance of FoRB and create space to explore this in Kyrgyzstan. The International Crisis Group's work on Myanmar (ICG 2017) and Burkina Faso (ICG 2016) explores the contexts in which FoRB violations occur in these countries and contribute to the conflict and raises the need for legislation supporting religious equality. The Advisory Commission on Rakhine State's (2017) report also highlights the need to respond to hate speech and political and socioeconomic inequalities, but like the work of the non-faith-based peace-building organisations mentioned above, does not outline solutions for integrating FoRB into peace-building practice.

Peace Direct's (Vernon 2019) conflict analysis incorporates religious dynamics but its solutions to this are also framed through interfaith work and are not linked to FoRB specifically.

USIP has long directly supported initiatives to analyse religion and belief dynamics in conflict, including through a FoRB lens (Hayward 2012), and has highlighted the usefulness of peace-building strategies for implementing FoRB (Nozell 2019). USIP helps highlight that neglecting or simplifying the role of religious discrimination and violence between different groups runs the risk of being incomplete and missing vital considerations through three case studies on Israel–Palestine, Sudan–South Sudan, and Sri Lanka (USIP 2018). USIP's primary focus in practice, however, has been to work through religious actors as influencers of peace, which does not inherently involve considerations of FoRB.

Search for Common Ground (2020a) also supports an 'Advancing Religious Tolerance (Art.38)' project in Nigeria which unpacks the FoRB dynamics, including their legal and political context in the country and seeks to trigger multilevel responses to weak mechanisms for addressing FoRB violations which underpin inter-religious violence. Mensen met een Missie's FoRB programme in Indonesia, Kenya, and Pakistan (2019b) similarly intervened at multiple levels to redress tension along religious or belief lines.

In ongoing work, USIP (n.d.b.) states that its research will analyse the link between religious freedom, peace, and development, but its immediate integration of findings into practice through the prism of FoRB, as with their *Religion in Conflict and Peacebuilding* report (2018), is not clear or outlined. The Joint Initiative for Strategic Religious Action (JISRA) (Tearfund 2020) coalition also brings in peace-building expertise, including on approaches to discussing FoRB in a way that finds common ground in a locally legitimate and relevant way and that is needed to change behaviour that undermines FoRB violations.

While some theoretical and even practical progress has been made in integrating a FoRB lens into peace-building work, and all the dimensions this brings, there is no systematic discussion and integration in practice of this important aspect of people's identities and the influence of this on violent conflict. There remains no consensus or common conscious application of FoRB in peace-building literature, approaches, (and practice), and due to its inherent consideration of religion which many see primarily as a driver of conflict, it is often intentionally side-lined. Reluctance/concern by funders to work with religion or belief dimensions in peace-building work also means that funding has been severely restricted for integrating FoRB into peace-building research, theory, and practice – exacerbating the gaps that exist. Educational initiatives such as FoRB literacy, which could include communication of all the angles and considerations a FoRB lens provides for peace-building – over and above religious literacy which focuses on teaching about others' beliefs – may be helpful here also. Any such process would also, however, need to be tailored after facilitating space to understand the concerns and practical difficulties that are perceived to exist by peace-builder practitioners.

## 6 Conclusion

This chapter has analysed the connections and gaps between the human right to FoRB and the major development and peace-building literature, approaches, and practice. Based on this analysis, it is evident that the intersection of these disciplines remains largely underexplored and FoRB overwhelmingly continues to fall between the cracks. The examples elucidated in this chapter indicate a general ambivalence towards, or even avoidance within development and peace-building circles of FoRB. There are several reasons explored in this chapter for this, which include the misperception that FoRB protects religious institutions' or people's harmful practices or even the use of religion to 'other' and incite violence towards people.

Despite the default position within the two largely secular development and peace-building spheres being one of innocence to the utility of applying a FoRB lens to their work, there are notable exceptions. A few academics and practitioners have begun to explore the intersection between development and FoRB. These include a focus on positioning FoRB within the context of the broader SDG framework, through which religion, belief, thought, or conscience (Article 18) becomes an important lens for identifying and addressing intersecting inequalities that lead to certain people being 'left behind' from a development perspective. There are also notable government or coalition initiatives that are starting to explore development approaches with a FoRB lens specifically applied (for example, CREID and JISRA).

In the peace-building world, although there is more broad engagement with religion on account of the global attention to conflicts with a religious element to them, this has not equated to an application of a FoRB lens or integration within peace-building work in this sphere. The lack of consensus or common application in work at the intersection of religion, religious identity, and peace-building in theory and practice has exacerbated integration of FoRB considerations being overlooked. Evidence explored in this chapter suggests that even though FoRB is occasionally named as a valuable goal, the frameworks from which peace-building theory has emerged, have not given rise to analysis or exploration of religious identities and related inequalities beyond a superficial level, which means that gaps remain in practice.

Even where peace-building or development academics and practitioners do engage with religious or belief identities, this tends to fall short of truly applying a FoRB lens. Evidence from sources analysed in this chapter highlights that peace-building and development academics and practitioners tend to focus on practical partnerships with religious bodies or engagement through interfaith dialogue and other forms at the collective identity level. This work does not equate to FoRB. While these approaches have value, depending on the specific context, it can risk assuming homogeneity where it may not exist and reinforcing specific religious hierarchies or structures. Crucially, however, the focus on the collective identity level fails to engage with, or account for, individuals' intersecting (religious or belief and related) identities that underpin the real lived experiences and motivations that often manifest themselves in conflict or inequalities. Application of a FoRB lens is therefore a crucial part of ensuring no 'blind spots' in the pursuit of development and peace-building goals.

While ever more organisations in development and peace-building spheres are expanding their scope and focus to consider FoRB, further work at the intersections of FoRB, development, and peace-building is much needed. For the realisation of human rights, peace, and better development, practitioners in FoRB and other human rights, development, and peace-building spheres need one another. Each one of these spheres of work holds a different and uniquely useful perspective that forms a crucial part of the puzzle for building solutions to discrimination, inequalities, and conflict. There are many unheard voices and much to listen to from which to collect information and grow disaggregated data. There is also much to learn from each other in the different human rights, development, and peace-building spheres. It is crucial that this conversation is a truly global one, rooted in listening to those often overlooked in diverse contexts and then shared to build up understanding and good practice across the fields.

### Notes

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- 1 Katharine Thane, Senior Advocacy Officer, Migrants' Rights Network, UK.
- 2 See also this **Statement**.
- 3 'Discrimination constitutes any distinction, exclusion, restriction or preference or other differential treatment that is directly or indirectly based on the prohibited grounds of discrimination and which has the intention or effect of nullifying or impairing the recognition, enjoyment or exercise, on an equal footing, of Covenant rights' (UN CESCR 2009).
- 4 See, for example, SDG Tracker (2018) for official and unofficial indicators employed.
- 5 See, for example, Rogers and Dionne's *A Time to Heal, A Time to Build* (2020) paper.
- 6 See UK government press release (2018) and the USAID website (USAID 2021a).
- 7 Article 18(3), International Covenant on Civil and Political Rights.
- 8 See *Building Bridges for Peace* (Grenville 2019).

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## PART 5

### **Conclusion**

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# Chapter 11

## Way Forward\*

Mariz Tadros<sup>1</sup>

### **1 Recasting freedom of religion or belief for religious equality**

The case studies presented in this book, and the insights drawn from their analysis, highlight the wealth of knowledge that can be gained from more grounded research on the nature, scope, and depth of religious otherization, as experienced by people who are already socioeconomically excluded. Further research is needed to redress the absence of discussion of religious inequalities in international and national discourses, policies, and practices of inclusive development. Undoubtedly, evidence is not a panacea for the redress of injustices; however, it provides some insights into what a development policy that is religiously inclusive of people on the margins may look like. Below are some overarching themes from the chapters, highlighting ways in which freedom of religion or belief (FoRB) can be recast conceptually and in praxis to redress religious inequalities. The three themes are: (1) broadening the meaning of FoRB, (2) understanding religious inequalities in their intersections with other drivers of inequality, and (3) embedding FoRB in relation to other banners such as heritage.

### **2 Whose reality of FoRB counts?**

In this section, we highlight ways in which the various case studies have challenged us to reconsider broadening our conception of what constitutes FoRB and to interrogate what can be gained if we go beyond the top-down formulations that we sometimes use to straitjacket this highly complex idea.

In a global context where the targeting of people on the basis of their real or perceived religion or beliefs is both a daily reality for many and a threat to their very existence, there is an urgency in understanding and addressing FoRB violations. The advancement of the cause of making societies more inclusive and just, by redressing religious inequalities, is possible through visions that are ‘at least to some degree... ours to shape, revise and reimagine, and mould to our interests’ (Decosimo 2018: 15). To this end, we can reimagine what constitutes FoRB in order to broaden how it can be used. From the case studies presented here, we highlight three ways of recasting FoRB in ways that speak to people’s realities.

First, religious equality is not to be equated with the right to practise a religion, but the right to exercise religious agency in whatever form or belief system, as long as it does not impinge on the rights of others. This exercise of religious agency includes the right to mix and match different beliefs.

Millions of people around the globe exercise their religious agency in a dynamic and fluid way that draws on the spiritual repertoires and heritages of their families, communities, and their own personal experiences. This practice of religious agency in a highly syncretic and eclectic manner can challenge leaders and influential figures in religious traditions, majority or minority, that endeavour to promote 'purist' versions of religion in accordance with their very specific interpretations.

Hence, FoRB necessarily entails protecting and defending the right of individuals and people to engage in different expressions of spirituality as they deem fit, even where this clashes with powerful bastions/guardians of specific religions. This is particularly important as some scholarship has recognised FoRB in intra-group terms; that is, as the freedom to challenge one's own religion from within. However, there is less consideration thus far given to the right to dynamically mix and match across religions or belief systems. In terms of action towards ensuring equality of all to exercise religious agency, it means challenging political movements that endeavour to homogenise society to follow one particular ideology and it also means challenging purists within any particular religion who vilify – to the point of persecution at times – followers who syncretically engage with different religious heritages.

In order to uphold individuals' rights to be free from all forms of religious homogenisation, this may mean, as in the case of Shah and Shah's chapter, defending the right of a woman who says she belongs to the Hindu faith to draw on repertoires of different religions as she wishes without being harassed by ultra-right-wing Hindus for not practising Hinduism in the 'pure' way. In other cases, where the actors are different, it may mean a struggle on dual fronts. Firstly, this may entail defending the rights of an individual who belongs to a minority religion in a particular context against state-endorsed homogenisation by the majority. Secondly, it may involve a struggle against the leaders within that individual's own religious tradition.

The second significant contribution from the case studies presented in this volume is also intended to broaden the conceptual bandwidth of the concept of FoRB. Scholarship and a great deal of praxis championing FoRB has focused on followers of religions that have doctrines which are often inscribed in a body of text (Gatti *et al.* 2019: 88–89). This is understandable given that many of the twenty-first century genocides have been against people with defined religions (Muslims in Myanmar and China, Yazidis and Christians in Iraq, etc.). However, the chapters on indigenous expressions of religious agency in India, South Africa, and Uganda also point to the attention that is needed to the 'belief' component of FoRB.

Humanists have championed the importance of recognising and including the rights of those who do not belong to a religion and define themselves as atheists or non-believers pertaining to a dominant or majority faith, and have consistently reminded advocates that it is about freedom of religion **or** belief. The contribution that the scholarship in this volume makes is on the importance of recognising those that believe deeply in a spirituality that entails rites, rituals, and beliefs but is of a non-codified nature and is unconventional in its character. This is perhaps particularly most powerfully conveyed by the chapter on South Africa:

During an interview in Marapong with Francina Nkosi, resident of Shongoane and local human rights defender, she shared her hope for future developments in Lephalale, that 'land be made available for farming', as a gateway to poverty reduction by uplifting women's participation in agriculture, as well as reducing food and intergenerational nutrition security. Nkosi further described how 'land is sacred in African traditions; therefore, it not only nourishes us with food, indigenous seeds and livelihoods, it is through the land that we are able to dream and connect with to [sic] our African spiritualities'.

(Tifloen and Makgoba, this volume, p167)

One of the areas that merits further engagement is the protection of indigenous people's FoRB, or their right to religious equality. Marshall (2021: 30) notes that,

of particular concern currently is the vulnerability and invisibility of indigenous belief systems and religions that are being decimated by the loss of territories and land with either natural features or ancestral burial sites that are critical to their world view and spiritual systems and beliefs. It is tragic and wrong that indigenous peoples feature so little in debates at this time about FoRB.

One of the reasons for the absence of an engagement with the right to religious equality of indigenous people is that indigenous people themselves have rarely framed their struggle for rights to land and preservation of their own cultural fabric in terms of FoRB. A classic example is the Adivasis who represent one of the world's largest surviving populations of indigenous people, yet they are politically, socially, and economically marginalised, even more so than India's Scheduled Castes in some human development dimensions. Most are traditionally forest-dwelling and have animistic religious practices but have been dispossessed of their ability to access the forest and follow their spiritual traditions, which are inextricably intertwined with the forest.

This book has sought to contribute to redressing this gap by highlighting the trajectories of indigenous people and their sacred beliefs when they are encroached upon by governments, non-state actors, and the private sector. The relationship between the material and immaterial challenges many of the conceptions of conventional understandings of what is sacred. This is because it shifts our attention away from the sacred (understood in terms of places of worship and the objects in them) and towards considering water, trees, and the relationship between nature and humans as sacred.

### **3 Intersecting identities, intersecting drivers of inequality, and intersecting struggles**

In this section, we draw inferences from the various chapters on how inequalities shape experiences of religious otherization.

Relatively privileged groups can be motivated to initiate conflict to preserve access to power and resources (Cederman, Gleditsch and Buhaug 2013; Østby 2013). For example, the Alawites in Syria, despite being a

religious minority, have used their control over state and military power to oppress other religious groups in the country. It is also important to note, as Ghana (2012) suggests, that a group that is being oppressed on account of their religion in one context may be the oppressors in another context. For example, Hazara Shias are the targets of extreme oppression by the Taliban in Afghanistan, while in neighbouring Iran, a theocratic government ruled by Shia clergy is oppressing religious minorities.

Hence, **minoritiness** is very much a concept that is devoid of meaning when referring to a religious group stripped of their specific context. The concept of intersecting identities contributes to the analysis of the situatedness and contextualisation of **minoritiness**. It allows for an exploration of the dynamic way in which power permeates and informs relations of privilege and subordination in any given context. The case studies presented in this book all provide detailed examples of intersecting identities, whether this is at the ethnic–religious nexus (Nigeria, Sudan) or geographic–religious marginality (South Africa), or indigeneity–religious marginality (Uganda, Adivasis in India), or at the intersection of caste and religious marginality (Hindus and Christians in Pakistan, Dalit Hindus, Christians, and Muslims in India).

A key axis that underpins all the cases of intersecting inequalities is their socioeconomic exclusion. All the contributions in this book have shown how critically important it is to use an intersectional lens when analysing the interplay of many drivers of inequality, discrimination, and targeting experienced by people on the ground.

The idea of poverty amplifying the effects of religious marginality and, vice versa, religious marginality worsening poverty, are both well demonstrated in the case studies presented here. In South Africa, extreme poverty has made the people in Steenbokpan (Tifloen and Makgoba, this volume) increasingly vulnerable to the allure of selling land to mining companies in a manner that does not secure their rights to their sacred sites. In Pakistan, being born in a context where caste is prevalent and being in extreme poverty accentuates the vulnerability of Hindus and Christians in Sindh to experiencing attempts at conversion and being targeted for their religious affiliation. Alternatively, having faith and beliefs tied to the land, such as in Uganda, increases the vulnerability of the indigenous people to impoverishment and relative deprivation when they are evicted from their ancestral grounds.

However, the fact that experiences of marginalisation are compounded by the interplay of different drivers of exclusion (religious affiliation, ethnicity, class, caste, political orientation, etc.) does not preclude a separate analysis of how each driver affects the lived reality on the ground. For example, in the case of Pakistan, the experiences of exclusion of the Hindus and Christians from the World Bank's poverty alleviation programme was because they belonged to religious minorities, even if caste/class accentuated such experiences. This is critically important as the recognition of intersecting identities and intersecting drivers of inequality should not be used as a pretext for overlooking or denying the nature of religious otherization or targeting.

In other words, in view of the dire circumstances facing all socioeconomically excluded individuals who are of Dalit background,

some may be tempted to negate the religious affiliation dimension and emphasise that the discrimination they are subjected to is not on account of being Hindu or Christian but because of their caste. The recognition of the caste dimension of their identity should not be the basis of subsuming religious affiliation under it, thereby denying their very specific experiences of targeting on account of their association or affiliation with a minority religion in the context of Pakistan.

Making visible the variegated components of intersecting identities and drivers of exclusion and marginalisation points to the differentiated experiences of religiously marginalised people. All the case studies in this volume are underpinned by experiences of discrimination, targeting, and religious otherization to various extents. However, this does not suggest that everyone's predicament is one and the same. Fox's study of 597 religious minorities' differentiated experiences of discrimination in 177 countries arrives at the same conclusion: that there are variations in manifestations and power configurations (Fox 2016). Undoubtedly, there are recurring patterns of how religious otherization occurs, in terms of how vilification, unequal rights, and unequal duties manifest themselves. However, the chapters in this book bear evidence to the fact that powerholders treat individuals and communities differently depending on a number of critical factors.

The first factor is the extent to which the individual or community is deemed to represent a threat to the status quo, and the interests of those in power. It is not surprising therefore that where land and economic assets are concerned, groups and communities who hold beliefs distinct from the majority become the target of oppression (the chapters on India, South Africa, and Uganda in Part 3 are powerful examples). The second factor is the extent to which powerholders pursue an ideology of homogenising society and what means they have available to enforce it.

Third, the level of internal cohesion within a group or community as well as its repertoires of strength, resistance, subversion, adaptation, and survival can also, to a certain extent, influence how it is affected by the policies and practices of religious marginalisation.

While the Adivasis have experienced extreme forms of violence, their ability to organise collectively and effectively has at times enabled them to stand strong in the face of violent assaults by Hindu extremists. On the other hand, the various groups living in south Sudan, having experienced ethnic and religious cleansing by the Sudanese government in the north, were so weak and economically impoverished that they had no choice but to participate in Islamic financing programmes, even when they found the Islamic Bank to be a dubious actor and its policies anathema to their ideals of religious pluralism. Accordingly, on the one hand, it is crucial to recognise the commonality of religious otherization as a phenomenon and on the other, to avoid essentialisation that operates on the assumption that all religious minorities share one common experience.

On a practical policy level, it is understandable that activists and champions of religious equality and pluralism may wish to see all people who experience religious otherization unite against the actor in power that is advancing a religious homogenisation scheme. By understanding that distinct intersecting identities are experienced by religiously otherised

individuals and communities, we will gain insights into their reading of their position and situation. For example, an Ahmadiyya minority in Pakistan may be keen on distinguishing their 'Muslimness' from groups that are non-Muslim minorities and go to great lengths to signal that they are not to be 'put in the same basket'. Hence, people may not engage in collective action around a common agenda of challenging religious homogenisation.

The intersections of identities and inequalities also drive struggles that involve an enmeshment of material and spiritual claims-making. Rarely is the banner of religious equality or FoRB raised independently of other demands associated with economic justice. In the case of the Adivasis, for example, their demands for 'water, forest, land' represented a common struggle for both land and the right to their spiritual and cultural heritage, since all three involved a co-penetration of the spiritual and the material (see Mader, this volume).

In South Africa, the Ithuteng Women's Group continue to save indigenous seed as an act of resistance, and farm on a small scale, very much like what the Adivasi groups do with their 'seed bank'/'seed exchange'. The communities' seed-saving preserves and counteracts the over-extraction of natural resources and the resultant ecological degradation, by preserving biodiversity and promoting the sustainable use of natural resources. This action also preserves traditional seeds which form part of these cultures and contribute to ensuring food security.

#### **4 Broadening the horizons of how we promote religious equality**

In this section, we highlight the possibilities of promoting FoRB under other banners or platforms. One of the key learnings from the case studies presented in this book is that there is a pressing need for creative ways to enable the advancement of religiously inclusive societies and politics for the benefit of poor people that go beyond the conventional human rights and foreign-policy instruments that have been the 'bread and butter' of FoRB promotion. The evidence from the chapters on India, South Africa, and Uganda in this volume indicates that protection and preservation of people's religious and cultural heritage is a very important approach for promoting FoRB and pressing for religious equality. Evoking heritage protection has cultural, political, and legal merits which have not been fully recognised in FoRB scholarship. It has the potential to recast FoRB beyond its foreign-policy genealogy and release repertoires of creativity and innovation to make societies more inclusive of the 'religious other'.

The use of heritage repertoires to make manifest the identity of a religious minority enables a connection with the broader population. This enables that population to taste, smell, hear, and sense the value of living in a multicultural and religiously diverse society. It turns religious equality on its head: from being an issue exclusively considered a zero-sum game to one where the benefits of diversity are tangibly demonstrated and experienced. It is the population experiencing the value of other cultural traditions in a celebratory manner that paves the way for an emotional connection with those considered as 'the other'. The strength of such an approach in the case of the Adivasis is that its deployment of recognisable heritage markers allows for its self-preservation without seeming insular or hostile to the broader population. By mediating heritage practices to officials and the

community in colourful and celebratory ways (music and art), and even including outsiders in celebrations and affirmations of heritage, it mitigates against accusations of being dangerously clandestine and hostile to the broader culture.

The other advantage to engaging through the communication of heritage markers is political. Adivasi performativity through heritage in the form of song, dance, or food is conducive to providing a recognisable, distinctive identity *vis-à-vis* other movements that are classified as security threats by the Indian government. In such a context, it is the celebration of indigenous culture and spirituality through a heritage prism that, in the words of Mader (this volume), serves to provide a ‘protective shield and alibi’ (p116). Mader contrasts the celebration of religious events ‘enjoying greater *de facto* legal protection than protests, and cultural festivities serving as platforms for engaging high-ranking officials and politicians without being overtly “political”’ (p116). While the Indian constitution does guarantee right to FoRB, however, people who have evoked the right to religious equality have on many occasions faced a societal backlash from more militant sections of Indian society that follow a hard-line Hindutva ideology (see chapters on India by Mader, and Shah and Shah, this volume).

Claims-making in relation to national laws and programmes intended to preserve a country’s cultural diversity demonstrates the legal merits of promoting religious equality through heritage. In India, it is a non-FoRB-specific legal act that can serve to promote FoRB – such as the Forest Rights Act, which privileges claims-making made on the basis of indigeneity ‘on the basis of religion or distinct spiritual practice’ (Dlugoleski 2020: 239). In South Africa, people also mobilised to demand their rights to land (and by proxy, access to the sacred sites on those lands) by pressing for the enforcement of the heritage law.

In all of the cases above, rights-claiming under the heritage banner was not only made in terms of tangible heritage (such as heritage sites) but also intangibly, in terms of religious practices, rites, and rituals that render meaning through collective memory. This is crucial as it suggests that for the interface of heritage and FoRB to serve to secure people’s rights, both spheres would need to significantly broaden their horizons. While FoRB would need to capitalise more on heritage repertoires for promoting inclusive societies for the socioeconomically religiously marginalised, heritage preservation as an arena would need to recognise oral and intangible heritage more at its centre rather than at the fringes.

## 5 Moving forward

The chapters in this book represent a first step to providing badly needed evidence on what works and what does not in redressing religious inequalities in different contexts. It is a call for further research but does not present a blueprint for what such an agenda should look like. The cases are intended to stir debate about the blind spots, the ‘elephants in the rooms’ and the unspoken, uncomfortable truths.

We, as researchers, practitioners, faith leaders, human rights activists, policymakers, and programmers, need to broaden our range of collaborators, the spaces in which we engage, our epistemic approach, and how we learn

(and unlearn, by challenging our assumption about the nature of FoRB or religious equality and inequality).

In order for us to be able to identify marginalised people's resistance to religious otherization and other injustices, we would need to be able to recognise these forms of action where they occur. This necessitates constructing partnerships with those actors, as diverse and as unconventional as they are, so as to be in the position to learn alongside them. For Western research, policy, and practice institutions, no matter how committed to learning from the bottom up they may be, their positioning does not always enable access beyond a narrow remit. Many of the cases presented in this book undoubtedly point to the richness of human struggles in relation to FoRB and religious equality around the world, but many are outside the remit of conventional international development projects.

One of the key elements to broadening our horizons in this area is to recognise that many people's struggles are not framed in terms of FoRB or religious equality. When you are on the margins of society, you may not be aware that constitutionally or by law, you are supposed to be treated without religious discrimination or that the forms of encroachment you experience represent FoRB violations. This internalisation of marginalisation has long been documented in the literature; however, it is particularly relevant for the discussion of people's experiences of inequality.

Moreover, even if they are acutely aware that they are being denied a right that is theirs, this does not suggest that they are aware of mechanisms/instruments that enable them to successfully secure their entitlements in the name of FoRB. This is powerfully conveyed in the chapter on South Africa:

...people were not well informed on their rights regarding FoRB, nor were they familiar with the NHRA [South African National Heritage Resources Act No. 25 of 1999], which is in place to protect the cultural and religious rights of people in South Africa. In summary, we recognise that people mobilise around the rights which they know they have.

(Tifloen and Makgoba, this volume, p168)

In this book, we have sought to make visible these invisible dynamics at work – invisible not to the people experiencing them, but to scholars, practitioners, and activists keen to learn from global struggles around FoRB. We have proposed the term religious inequality to amplify the relational dimensions of the intersections of poverty, religious marginality, and other qualifiers such as gender, ethnicity, caste, class, political orientation, geography, and so forth. In so doing, we have urged that religious minorities are not engaged with in a reified manner, but rather, that religious otherization be understood in a contextual and situated manner. We hope that the case studies presented here have not only piqued the interest of FoRB and development scholars but also policymakers keen on being truly inclusive in their outreach.

As Thane notes in her chapter, except for one marginal mention, religious inequalities are entirely lacking in the Sustainable Development Goals (SDGs) as well as in the international agencies' strategies of

enforcement. And yet religious otherization needs to be acknowledged if the 'leave no one behind' agenda is to become a reality. Feldmann Kaye's chapter shows concretely how taking into account FoRB and religious inclusivity is essential for achieving SDG 3 on health and wellbeing for all. Aderounmu's chapter shows the importance of considering the dynamics of religious majority–minority relations when designing interventions that seek to redress inequalities in education in alignment with SDG 4 on quality education. The extension of scholarships for socioeconomically deprived students is, in principle, a scheme that secures an educational pathway for the underprivileged. However, if a scholarship scheme is implemented without sensitivity to the power dynamics in a context where tensions run high, it can create new sources of social in-cohesion along religious lines.

Undoubtedly, this book represents only the beginning of a journey to pluralise scholarship, democratise the essence of religious equality, and press for evidence-informed policy. It has generated as many questions on power dynamics as it has shed light on them.

There is much work to be done in collaborative partnerships to understand experiences of religious otherization by socioeconomically marginalised people and ways in which they resist. Moreover, we have yet to undertake participatory yet systematic studies of the intended and unintended consequences of major multilateral and bilateral aid initiatives in terms of their impact on redressing religious inequality or promoting FoRB. Finally, there is so much learning awaiting us from people on the margins who use different framings, approaches, actions, and claims-making to counter religious otherization outside our own conceptualisations and lenses. This book is a first step in that direction.

## Notes

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# What About Us?

## Global Perspectives on Redressing Religious Inequalities

How can we make religious equality a reality for those on the margins of society and politics? This book is about the individual and collective struggles of the religiously marginalised to be recognised and their inequalities, religious or otherwise, redressed. It is also about the efforts of civil society, governments, multilateral actors, and scholars to promote freedom of religion or belief (FoRB) whatever shape they take. The actors and contexts that feature in this book are as diverse as health workers in Israel, local education authorities in Nigeria, indigenous movements in India, Uganda, or South Africa, and multilateral actors such as the Islamic Development Bank in Sudan and the World Bank in Pakistan. Some of the case studies engage with development discourses and narratives or are undertaken by development actors, while other cases operate completely outside the international development paradigm. These case studies present some important insights, which while highly relevant for their contexts also draw out important insights for academics, practitioners, activists, and others who have an interest in redressing religious inequalities for socioeconomically marginalised populations.

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