

Cambridge AS & A Level · Sociology 9699 · Notes

Globalisation, poverty and inequalities

A2

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Read first: [Perspectives on globalisation](#)

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What you need to know

By the end of this topic you should be able to:

1. **Weigh up the debate about how globalisation affects life chances in developing countries**, in three areas: **income** (jobs, wages, poverty), **education** (schooling, literacy, skills) and **health** (life expectancy, disease, medicine). Be ready to say who gains and who loses, between countries and inside them, and to use the measures (such as GDP per head and the Human Development Index) that show the gaps.
2. **Explain what transnational organisations do to tackle global inequalities, and judge how far they have succeeded**. This means international bodies such as the UN, World Bank, IMF and WTO, groupings such as the EU and G7, charities and other non-governmental organisations, and the aid they give.
3. **Explain and evaluate sociological explanations for global inequalities**, including **capitalism**, **colonialism**, **post-colonialism** and **patriarchy**, and weigh them against rival explanations such as modernisation theory.

The theories of global inequality (modernisation, dependency and world systems) are explained more fully in *Perspectives on globalisation*. This note recaps what you need and adds the parts this topic asks for: life chances, transnational organisations and aid, colonialism, post-colonialism and patriarchy.

Understand it

Four words to get straight

- **Development** is a society's improvement in living standards and life chances over time. Economists often mean economic growth; sociologists also include health, education, freedom and equality.
- **Poverty** can be **absolute** (not having enough for basic survival: food, clean water, shelter, basic health care) or **relative** (having much less than is normal in your society). The World Bank sets an **international extreme poverty line** of a few dollars a day per person, adjusted for what money buys in each country.

- **Global inequality** is the gap between countries (and between people across the world) in income, wealth, power and life chances. It is different from **inequality within a country**, the gap between rich and poor citizens of one country. A question about "between countries" and a question about "social inequality" need different evidence.
- **Life chances** (**Weber's** term) are a person's chances of getting the good things a society offers: a long healthy life, schooling, a decent income, safety. Where you are born is the single biggest influence on them.

Developing countries are also called the **Global South**; developed countries the **Global North**. Each label simplifies a very varied group.

Measuring the gap

Comparing countries needs indicators, and each one tells only part of the story.

- **Economic measures:** **GDP** (gross domestic product) or **GNI** (gross national income) **per head**, usually adjusted for **purchasing power** so a dollar is worth the same basket of goods everywhere. They are easy to compare but hide how income is shared out, ignore unpaid work (much of it done by women) and the informal economy, and count harmful spending (such as cleaning up pollution) as growth.
- **Social measures:** life expectancy, infant and under-five mortality, literacy, years of schooling, access to clean water and sanitation, calories per day, doctors per thousand people.
- **Composite measures:** the UN's **Human Development Index (HDI)**, used since 1990, combines **life expectancy**, **education** (years of schooling) and **income** (GNI per head) into one score between 0 and 1. Its three parts are exactly the three life chances in the syllabus. The **Multidimensional Poverty Index** looks at households going without in health, education and living standards at the same time.
- **Limits:** data from poor countries are often patchy; averages hide gaps by class, gender, region and ethnicity; and choosing what counts as "developed" is a value judgement. Critics say Western standards are being used to measure everyone. **Bhutan's** idea of **Gross National Happiness** is one alternative. **Sen** argued that development should mean expanding people's real freedoms and capabilities, not just income: **Kerala** in India and **Cuba** have high literacy and life expectancy for their income levels.

Globalisation and income

The hopeful picture. Neoliberals such as **Bhagwati** argue that open trade, foreign investment and global supply chains create jobs and growth that lift people out of poverty. The share of the world's people in extreme poverty fell from well over a third in 1990 to under a tenth just before the COVID-19 pandemic. Most of that fall happened in **China**, where the World Bank estimates about 800 million people left extreme poverty after the country opened to world trade. The **Asian Tigers** (South Korea, Taiwan, Singapore, Hong Kong) went from poverty to wealth in two generations by making goods for export; in the early 1960s South Korea was about as poor as many African countries. Factory work in TNC supply chains often pays more than farm labour, and **Kabeer** found that Bangladeshi women garment workers valued the wages and the independence they brought.

Migration and remittances. Globalisation makes it easier to work abroad. Money that migrants send home (**remittances**) pays for food, school fees, medicine and housing; World Bank figures show remittances to low- and middle-income countries are now several times larger than all official aid.

The worrying picture.

- **Who gets the gains.** Milanovic's "elephant curve" shows that from 1988 to 2008 the biggest income gains went to the new middle classes of Asia and to the richest 1% of the world; the very poorest gained far less. The **number** of people in extreme poverty in sub-Saharan Africa was higher in 2019 than in 1990, even though the share fell.
- **Cheap labour.** TNCs place factories where wages, taxes and safety rules are lowest (a **race to the bottom**). The collapse of the **Rana Plaza** garment factory building in Bangladesh in 2013 killed more than 1,100 workers. Profits flow back to shareholders in rich countries, and TNCs shift profits to low-tax places, so the host country keeps little.
- **Commodity dependence.** Many poor countries still sell one or two raw materials or crops whose world prices swing wildly, while buying expensive manufactured goods.
- **Migrants on the losing side.** Cheap migrant labour is a gift to builders, farms and care homes in rich countries and the Gulf, and to the shoppers who pay lower prices. For the workers the picture can be bleak: recruitment debts, confiscated passports, crowded dormitories and no union or legal protection. A labourer who borrowed to pay an agent may return home poorer than when he left.

Globalisation and education

- **Gains.** Global targets (the UN's goals, below) and aid pushed governments to expand schooling. When several African countries scrapped primary school fees (Malawi in 1994, Uganda in 1997), enrolment jumped. The number of primary-age children out of school worldwide roughly halved between 2000 and the late 2010s, and the gap between girls and boys in primary school closed in most regions. The internet, online courses and cheap phones spread information; global firms need educated workers and fund training.
- **Losses.** In the 1980s and 1990s IMF and World Bank **structural adjustment programmes** (loans with conditions) made many governments cut public spending and charge fees for schooling, which pushed poor children out. Schools often teach a Western curriculum in a former colonial language, which suits elites who already speak it. The **brain drain** takes the best-qualified graduates to rich countries, so poor countries pay to train people whose skills are used elsewhere. Quality is often low: many children attend school without learning to read well.

Globalisation and health

- **Gains.** Global life expectancy rose from about 64 years in 1990 to about 73 in 2019, and deaths of children under five fell from about 12–13 million a year in 1990 to around 5 million in the early 2020s. The WHO led the eradication of **smallpox** (declared in 1980). **Gavi**, the vaccine alliance set up in 2000, and the **Global Fund** (against AIDS, tuberculosis and malaria) brought vaccines, bed nets and drugs to poor countries. Medical knowledge now spreads quickly across borders.

- **Losses.** Global drug companies protect patents and price medicines for rich markets. Around 2000 branded HIV drugs cost over 10,000 US dollars per person a year; in 2001 an Indian generic maker offered a year's treatment for a few hundred dollars, at the same time as drug firms were taking South Africa to court to stop it buying cheaper medicines. Doctors and nurses trained in countries such as Ghana, Zimbabwe and the Philippines staff hospitals in the UK, USA and the Gulf. TNCs market tobacco, sugary drinks and processed food in poor countries as rich markets shrink. Pollution from factories and mines, and the effects of climate change (floods, droughts, heat), hit the poorest countries hardest although they caused least of it. Diseases also travel faster, as COVID-19 showed.

Inside countries: which groups gain and which lose?

Countries are not single units. Within a developing country, globalisation's effects depend on class, gender, ethnicity and place.

- **Elites and the urban middle class** with education, English, capital or political links benefit most: they work for TNCs, run export businesses and travel. **Sklair's transnational capitalist class** includes elites from poor countries as well as rich ones. Inequality inside China and India has grown even as average incomes rose.
- **Rural people, informal workers and the landless** may lose land to plantations, mines or dams and be left behind.
- **Women** gain paid work and new ideas of gender equality from global media, UN agreements and women's movements, but often on the worst terms (low pay, insecure contracts) and with a **double burden** of paid and unpaid work. They are most of the victims of **people trafficking**.
- **Ethnic minorities and indigenous peoples** may lose land and culture, or find new allies through global campaigns.
- **Migrants** may gain higher wages, or be exploited; skilled migrants gain more than unskilled ones, and gains differ by gender and ethnicity (women in domestic work and some ethnic groups face the worst treatment).

The wider debates about globalisation's effects

Exam questions about "benefits" or "inequality" also reward arguments beyond income, education and health.

- **Politics.** Optimists link globalisation with the spread of democracy, human rights and free media; the internet helped protest movements in many countries. Pessimists point out that the spread is uneven: some regimes use global surveillance technology against their own people, and anger at outside influence has sometimes strengthened authoritarian rulers and violent movements.
- **Peace and cooperation.** Countries that trade heavily with each other have more to lose from war, and travel, study abroad and the internet build friendships across borders. Some writers hope this produces **cosmopolitan** people who see themselves as citizens of the world rather than of one nation. Less conflict matters for poverty: war is one of the biggest destroyers of income, schools and clinics in poor countries.

- **Awareness and global action.** Global media and social media show famine, disasters and abuses to the whole world. This has driven aid appeals, consumer campaigns against sweatshops (and safety agreements after Rana Plaza), fair trade and global social movements such as the Jubilee 2000 debt campaign.
- **Culture and social order.** When young people leave villages for factory towns and global media bring new values, the elders, religious leaders and customs that once kept order can lose their hold. Durkheim's word for the resulting normlessness is **anomie**; it is linked to rising crime and to families and communities pulling apart, which makes poverty harder to escape. Westernisation can also make local ways of life look backward. See *Globalisation and identity*.
- **Environment.** The burden of pollution, deforestation, resource extraction and climate change falls most heavily on poor countries, and disputes about who should cut carbon emissions divide rich and poor nations.
- **Is globalisation slowing?** Since the 2008 financial crisis and the pandemic, some rich countries have brought production home (**onshoring** or **reshoring**), raised trade barriers and turned to nationalist politics. If globalisation retreats, countries that relied on exports may lose the route that helped the Tigers and China.

Transnational organisations: who they are

A **transnational organisation** works across national borders. The ones that matter here fall into five groups.

Group	Examples	What they mainly do
Alliances of governments	United Nations and its agencies (UNDP, UNICEF, WHO), EU, African Union, G7, G20	Set global goals, coordinate aid, run health and food programmes
Global money and trade bodies	World Bank and IMF (both set up at Bretton Woods in 1944), WTO (1995)	Lend for projects, lend in crises with conditions, set trade rules
Non-governmental organisations (NGOs)	Oxfam, Save the Children, World Vision, WaterAid, Médecins Sans Frontières, BRAC	Run projects, give emergency relief, campaign
Partnerships and foundations	Gavi, the Global Fund, large private foundations	Pay for vaccines, medicines and research
Transnational corporations (TNCs)	Global manufacturers, retailers, mining and drug companies	Invest and employ for profit, sometimes fund social projects

TNCs are transnational organisations too, but their aim is profit, not reducing inequality. An answer about "transnational organisations" that discusses only TNCs leaves out the organisations whose job is tackling poverty.

Global goals. In 2000 the UN agreed eight **Millennium Development Goals (MDGs)** for 2015, such as halving the share of people in extreme poverty, universal primary schooling and cutting child deaths. Rich members promised debt relief, fairer trade and more aid. In 2015 they were replaced by seventeen

Sustainable Development Goals (SDGs) for 2030, including ending extreme poverty, quality education, good health, gender equality and climate action. The poverty halving target was met (mostly thanks to China); others, such as universal primary schooling, were missed.

How well have transnational organisations done?

Real achievements.

- **Health:** smallpox eradication; vaccines through Gavi; the Global Fund's AIDS, tuberculosis and malaria programmes; polio almost eliminated.
- **Money that would not otherwise exist:** World Bank loans for roads, power, ports and irrigation that poor governments could not finance alone; **debt relief** through the Heavily Indebted Poor Countries initiative (from 1996) freed money for schools and clinics.
- **Practical projects:** WaterAid's wells, toilets and hygiene training; Oxfam's support for small farmers with simple, affordable technology; BRAC's schools and health workers in Bangladesh; teacher training and microfinance (the Grameen Bank, whose founder **Yunus** won the Nobel Peace Prize in 2006, lends small sums mainly to women).
- **Skills and people:** charities send trained doctors, engineers and teachers and train local staff.
- **Problems no single state can solve:** pandemics, climate change, refugee crises and global finance need cooperation across borders; only transnational bodies can coordinate it.
- **Support for reform:** the EU's trade agreements and the World Bank's advice have helped some countries open up and attract investment; the WTO gives small countries a forum to challenge big ones.

Reasons for doubt.

- **Whose rules? Stiglitz**, a former World Bank chief economist, argued that the IMF pushed the same free-market policies on every country, whatever its needs. Structural adjustment cut health, education and food subsidies, and opened markets to Western firms. Voting in the IMF and World Bank is weighted by money paid in, so rich countries dominate. Marxists see these bodies as tools of global capitalism.
- **Whose money?** An NGO that gets much of its budget from Western governments, the UN or the EU is unlikely to bite the hand that feeds it by campaigning hard against those donors' trade and debt policies.
- **Where the money goes. Hancock** (*Lords of Poverty*) criticised aid agencies for spending large sums on salaries, offices, consultants and travel, so a fraction reaches the poor. Agencies also compete with each other and duplicate work.
- **Whose priorities?** Projects designed in distant headquarters can ignore local knowledge, or stop when funding ends. Much NGO work is emergency relief that eases suffering without changing the causes.
- **Whose hands?** Corrupt or unstable governments can divert funds; global goals such as the MDGs had little way of holding receiving governments to account for how they used the help; wars and disasters destroy projects; local governments may refuse to cooperate. The flip side: the programmes with the best records usually work closely with national and local governments.
- **The scale problem.** Global poverty has deep structural causes (trade rules, debt, unequal power) that projects do not touch. Dependency and world systems theorists argue that transnational organisations treat symptoms while the system that produces poverty carries on.

- **TNCs take more than they give.** Investment brings jobs, but profit repatriation, tax avoidance, land grabs and environmental damage can leave poor countries worse off.

Aid: types and the debate

Aid is the transfer of money, goods, skills or loans to developing countries on easier terms than the market offers. It comes in several forms, and the debate depends on which form you mean.

- **Humanitarian (emergency) aid:** food, shelter and medicine after disasters or in wars. Short term.
- **Development aid:** long-term projects in health, education, farming, water and infrastructure.
- **Bilateral aid** (one government to another) and **multilateral aid** (through the UN, World Bank or EU).
- **Tied aid:** must be spent on goods and services from the donor country.
- **Grants** (no repayment) versus **loans** (must be repaid, sometimes building up debt).
- **NGO aid**, funded by donations and government grants.

Aid works, or can. **Sachs** argued that the poorest countries are stuck in a **poverty trap** (too poor to save, invest or fight disease), and that a big, well-targeted push of aid for health, farming and infrastructure can lift them onto the first rung of development. Vaccination, bed-net and clean-water programmes have measurable results. Modernisation theorists see aid as a way to pass on capital, skills and modern values. Judging aid on its own is also unfair: a country's growth usually comes from debt relief, trade deals, reforms and aid working together, and it is impossible to say how much each one contributed. Some countries that are now prosperous, such as South Korea, received large amounts of aid during their early growth.

Aid fails, or harms. **Hayter** (*Aid as Imperialism*) argued that aid serves donors' political and business interests and ties poor countries to Western capitalism. **Moyo** (*Dead Aid*) argued that large aid flows to African governments feed corruption, weaken the link between governments and taxpayers, and create dependence. **Easterly** criticised "planners" in distant agencies who impose grand schemes, and favoured "searchers" who find out what works locally. Conditions attached to loans have pushed through cuts that hurt the poor; tied aid pays donor firms; food aid can undercut local farmers. Dependency theorists say aid leaves the unequal structure of the world economy untouched, and modernisation theorists say aid cannot replace the cultural and institutional change a country must make itself.

Weighing it up. Theft of aid makes headlines, but most agencies today audit their spending and choose local partners carefully, so the idea that most aid disappears is overstated. Many famous failures happened where almost nothing could work: a programme wrecked by civil war or an earthquake tells you about the war or the earthquake, not about aid in a peaceful country. The evidence suggests that specific, well-run programmes (vaccines, clean water, girls' schooling) work best, and general cash to unaccountable governments works least.

Explaining global inequality: capitalism

The Marxist explanation is that global inequality is built into the way capitalism works on a world scale.

- **Frank's dependency theory:** rich **metropolis** countries develop by draining wealth from poor **satellite** countries, so underdevelopment is something done to poor countries, not a starting point. Ties with the West harm rather than help.
- **Wallerstein's world systems theory:** one capitalist world economy with a **core** (high-skill, high-profit production), a **semi-periphery** (such as Brazil, India or Mexico) and a **periphery** (raw materials and cheap labour). The core keeps the most profitable work, and the system always needs a periphery. Countries can move between zones, which is how the theory explains the Tigers.
- **Neo-colonialism** (a term popularised by Ghana's first president, **Nkrumah**, in 1965): control without colonies, through TNCs, unequal **terms of trade**, debt and aid with conditions.
- **Global capitalism today:** TNCs shift production to cheap labour, IMF and World Bank rules open markets to Western firms, and a transnational capitalist class (Sklair) gains everywhere.

Doubts: China and the Tigers rose by joining global capitalism; some areas (remote rural and tribal regions) are barely part of it yet are very poor; poverty existed before capitalism; and the theory reduces everything to economics, leaving out culture, politics and gender (**economic reductionism**), and treats poor countries as trapped whatever they do (**determinism**). The key concepts, "dependency" and the three zones, are so loosely defined that it is hard to measure them or prove the theory wrong.

Explaining global inequality: colonialism

Colonialism is the direct rule of one country over another, as when European powers ruled most of Africa, South Asia and the Caribbean from the 1500s to the mid-1900s (the **Berlin Conference** of 1884–85 carved up Africa among European states). Marxists and dependency theorists see it as the origin of today's gap.

How colonial rule shaped development:

- **Extraction:** colonies supplied raw materials, minerals and cheap or forced labour; the Atlantic slave trade took millions of people from Africa.
- **Lopsided economies:** farmers were made to grow cash crops for export (cotton, cocoa, rubber, sugar), so many countries still depend on one or two exports and import food.
- **Destroyed industries:** Indian hand-woven cloth, once sold worldwide, was undercut by British factory textiles.
- **Arbitrary borders** joined rival groups and split others, storing up conflict.
- **Weak institutions:** rule through small local elites, education for a few clerks, and infrastructure built to move goods to ports rather than to link the country together.

Counter-arguments.

- **Goldthorpe** argued that colonial rule also left railways, roads, ports, schools, hospitals and legal systems that later helped development.
- **Comparison:** Ethiopia, barely colonised, is still very poor; Singapore and Hong Kong, both former British colonies, are rich. So colonialism cannot be the whole explanation.

- **Time:** most colonies gained independence 60 or more years ago, and since then their paths have split. South Korea, ruled by Japan until 1945, became rich through export industries. Cuba stayed poor in income but reached high literacy and life expectancy through state schools and clinics, and Tanzania's adult literacy campaigns raised reading rates without bringing much growth. Former colonies have achieved very different things, so the colonial past does not fix the outcome.
- **Other causes:** corrupt military or religious elites, civil wars, natural disasters, disease and climate can matter more now.
- **Culture:** modernisation theorists argue that values and institutions explain differences between former colonies better.
- **Definition:** colonial rule differed hugely by place and period, and "neo-colonialism" is so broad it can explain any outcome.

Explaining global inequality: post-colonialism

Post-colonialism has two meanings, and a good answer uses both.

- **The period after colonial rule:** the situation of countries that are independent but still shaped by their colonial past, through the structures listed above and through neo-colonialism.
- **Post-colonial theory:** a way of thinking that looks at how colonial power continues through **ideas, knowledge and images**, not just money. **Fanon** wrote about how colonial rule made the colonised see themselves as inferior. **Said's Orientalism** showed how Western writing pictured non-Western peoples as backward or exotic, which justified ruling them. **Spivak** asked whether the poorest (the **subaltern**) can be heard at all when others always speak for them. **Escobar** and other **post-development** writers argue that the very idea of "development" is a Western project that labels other societies as lacking and hands power to Western experts and agencies.

What this adds to explanations of inequality:

- Poverty persists partly because the West still sets the agenda: who counts as "developed", which policies are "right", which knowledge is valued. Global media still often show poor countries only through disasters and charity appeals.
- Local knowledge (for example, traditional farming suited to local soils) is dismissed in favour of imported models that may fail.
- Elites in former colonies often copy Western lifestyles and keep the old colonial structures for their own benefit.

Criticisms: it can be vague and hard to test; it focuses on culture and ideas and can neglect hard economic facts; and it can overlook the choices and responsibility of governments in developing countries.

Explaining global inequality: patriarchy

Feminists argue that global inequality cannot be understood without gender, because **patriarchy** (male dominance) shapes who is poor and how development works.

- **Development that ignored women:** **Boserup** showed that colonial and development schemes gave land titles, training and machines to men, although women did much of the farming, so women lost status and income.
- **Unpaid work:** women do most unpaid care and domestic work, which GDP does not count, so their contribution is invisible and they have fewer chances to earn. **Mies** argued that global capitalism relies on treating women's work as cheap or free.
- **Cheap labour:** **Elson and Pearson** found export factories hired young women because employers believed they had "nimble fingers" and would accept low pay; **Enloe** showed how global trade, tourism and military bases depend on women's low-paid labour.
- **Feminisation of poverty:** more of the world's poor are women, because of lower wages, less land ownership, less schooling and the burden of care.
- **Health and life:** **Sen** estimated in 1990 that about 100 million women were "missing" in Asia and North Africa because of sex-selective abortion, neglect of girls and unequal access to food and health care.
- **Education:** where girls are kept from school (for early marriage or housework), the whole society loses: educated mothers have healthier children and smaller families.
- **Violence and trafficking:** women and girls are most of the victims of people trafficking and sex tourism.

Doubts: gender gaps in schooling and life expectancy have narrowed in many developing countries; global women's movements, UN agreements and microfinance have improved some women's position; patriarchy exists in rich countries too, so it cannot alone explain why some countries are poorer than others; and Marxist feminists argue that capitalism, not patriarchy alone, is the root cause. Many sociologists treat patriarchy as something that makes poverty worse and shapes who suffers, alongside class and global position.

Rival explanations

- **Modernisation theory (Rostow's five stages, Parsons, McClelland):** poor countries lack the values and institutions (enterprise, achievement, rational planning, democracy) that made the West rich. Evidence: the Tigers, the UAE and China combined some Western ideas and markets with their own traditions and strong states. Neoliberals add free markets and trade.
- **Internal factors:** **Collier** (*The Bottom Billion*) described traps that keep the poorest countries stuck: civil war, dependence on natural resources (which feeds corruption), being landlocked with bad neighbours, and bad government. Disasters, disease and climate change add to them.
- **Overpopulation:** followers of **Malthus** argue that population grows faster than food and resources, so high birth rates cause poverty. Critics reply that poverty causes high birth rates (children are labour and security in old age), that birth rates fall as incomes, schooling for girls and health improve (the **demographic transition**), and that rich countries consume far more resources per head.
- **Convergence:** some functionalists and modernisation theorists (for example **Kerr's** convergence thesis) argue that all societies are moving towards the same industrial, modern stage. Critics point to different paths (China's state-led capitalism, the Gulf states), countries that have fallen back, and dependency theory's claim that the system keeps the periphery poor.

Key facts and formulas

There is no formula list in Sociology. "Learn it" means you must remember it.

Key term	Status
Life chances (Weber): chances of a long healthy life, schooling, income and safety	Learn it
Absolute and relative poverty; international extreme poverty line (World Bank)	Learn it
GDP or GNI per head; HDI (since 1990: life expectancy, education, income, scored 0 to 1); Multidimensional Poverty Index; Sen (capabilities, Kerala)	Learn it
Globalisation and income: Bhagwati, Milanovic (elephant curve), Kabeer, race to the bottom (Rana Plaza 2013), remittances	Learn it
Structural adjustment programmes (IMF and World Bank, 1980s–1990s); brain drain	Learn it
Transnational organisations: UN agencies, World Bank and IMF (1944), WTO (1995), EU, G7, NGOs, Gavi (2000), TNCs	Learn it
MDGs (2000–2015, eight goals) and SDGs (2015–2030, seventeen goals)	Learn it
Aid: humanitarian, development, bilateral, multilateral, tied; Sachs (poverty trap), Hayter, Moyo, Easterly, Hancock	Learn it
Capitalism: Frank (metropolis and satellite), Wallerstein (core, semi-periphery, periphery), neo-colonialism (Nkrumah 1965), Sklair	Learn it
Colonialism: extraction, cash crops, destroyed industries, borders; Goldthorpe	Learn it
Post-colonialism: Fanon, Said (<i>Orientalism</i>), Spivak (subaltern), Escobar (post-development)	Learn it
Patriarchy: Boserup, Mies, Elson and Pearson, Enloe, feminisation of poverty, Sen (missing women)	Learn it
Rival explanations: Rostow, Parsons, McClelland; Collier (traps); Malthus (overpopulation); Kerr (convergence)	Learn it
Paper 4: two essays from different sections, each 35 marks: AO1 9, AO2 11, AO3 15, so $9 + 11 + 15 = 35$	Learn it

How to do it

We have tagged 31 questions for this topic (2021–2026), 27 different (four November questions were repeated across two papers). All but two are 35-mark "Evaluate this view" essays from Paper 4; the other two are June 2021 Paper 3 questions from the old syllabus, each with a 9-mark "Explain" part and a 16-mark "Assess" part. Those 2 questions mix two types, so the counts add up to 33.

Question type	Questions
Evaluate a claim about who gains from globalisation (essay)	13
Evaluate an explanation of global poverty and inequality (essay)	10
Evaluate how far transnational organisations or aid reduce poverty (essay)	6
Explain a development idea (old Paper 3, 9 marks)	2
Evaluate poverty as the cause of global crime (essay)	2

Paper 4 lasts 1 hour 45 minutes for two essays, so allow about 50 minutes for each, including 5 minutes to plan.

The plan for every essay.

1. **Introduction** (3–4 sentences): define the key words in the quotation (globalisation, poverty, inequality, transnational organisation, aid, colonialism) and name the perspectives on each side.
2. **Explain the view in the question** (AO1/AO2) with named theories, thinkers and real examples of countries, organisations or programmes.
3. **Evaluate** (AO3): set out the other side as arguments against the view, linking each paragraph back with "this suggests the view is overstated because...".
4. **Conclusion**: answer the exact words ("only", "some groups more than others", "unsuccessful", "best explained") and say for which countries or groups it is most and least true.

1. Evaluate a claim about who gains from globalisation (essay) (13 questions)

Asked as: who benefits: only rich countries (1), some groups more than others (1), all social groups (1), only wealthy elites from global migration (1); the effect on inequality: greater equality between countries (2, one a repeat), greater inequality between countries (1), more social inequality (1); the effect on developing societies: positive impact (1), failed to benefit (2, one a repeat), entirely negative consequences (1), reducing poverty (1).

1. **Pin down the claim.** Is it about inequality **between countries**, inequality **inside** countries (social inequality), poverty, or **which groups** benefit? Pick the evidence to match. You may cover all dimensions of globalisation (economic, political, cultural, environmental) or focus on one, such as global capitalism, as long as you say so.
2. **Build both cases through three lenses**, taking the evidence from "Understand it", so the two sides answer each other instead of becoming two lists:

- **The life-chances lens:** income, education and health gains (falling extreme poverty, schooling, vaccines) against their costs (Rana Plaza, Milanovic, structural adjustment, brain drain, patents).
 - **The power lens:** neo-colonialism through TNCs and the IMF and World Bank (Sklair, Frank, Wallerstein), and the free-market recipe exported from the West as the wrong medicine for economies built on farming and raw materials, against neoliberals (Bhagwati) and modernisation theorists who see trade, enterprise and democracy as good for all.
 - **The social lens:** anomie, trafficking, exploited migrant workers and women's cheap labour (Elson and Pearson) against cosmopolitan contact, global awareness campaigns, remittances and Kabeer's garment workers.
3. **Weigh the lenses** against each other: for example, life-chance gains are real on average, but the power lens shows who sets the terms.
4. **Judge.** The usual verdict: globalisation's gains are real but unequal, going most to elites, the urban middle class and fast-growing Asian economies, while the poorest countries and groups gain least or lose.

Variants.

- **"Some groups more than others" or "social inequality":** organise by group (elites, TNC shareholders, urban middle class, rural poor, women, ethnic minorities, migrants), using the "Inside countries" section. Add who gains in rich countries too (consumers of cheap goods, employers of migrants) against factory workers who lost jobs.
- **"Greater equality between countries":** compare countries: China, India and the Tigers catching up against the poorest countries falling further behind. Add that globalisation may be slowing (onshoring, trade barriers, nationalism, climate disputes), which could freeze the gap.
- **Global migration:** who gains (rich-country employers and consumers, skilled migrants, families receiving remittances) and who loses (exploited workers, countries losing skilled staff); feminists add care workers and trafficking. Avoid a one-sided answer: show migrants themselves gaining as well as losing.
- **"Entirely negative" or "only rich countries":** words like "entirely" and "only" are easy to challenge; one strong counter-example (China, South Korea, falling child deaths) shows the claim is overstated, but explain why the gains are unequal.

2. Evaluate an explanation of global poverty and inequality (essay) (10 questions)

Asked as: capitalism: a capitalist world system (2, one a repeat), the spread of global capitalism (1), capitalist exploitation (1), dependency on rich capitalist countries (1), economic forces poorer countries cannot control (1); colonialism: the continuing impact of colonialism (2); old Paper 3 parts: overpopulation as the main cause (1), all societies moving to the same stage (1).

1. **Explain the named cause in depth first** (Frank, Wallerstein and neo-colonialism for capitalism; the five colonial effects, then neo-colonialism and post-colonial ideas, for colonialism).
2. **Show the strengths:** it brings in history and power, explains why Western help has achieved so little (rich countries gain from the gap), and fits evidence of TNC profits from cheap labour and resources.
3. **Test it with five probes** (your evaluation):

- **The exceptions probe:** who escaped? The Tigers, China and the UAE rose inside global capitalism; Singapore and Hong Kong were colonies and are rich.
 - **The timing probe:** poverty existed before capitalism and colonial rule; most colonies have been independent for 60 years or more.
 - **The inside probe:** corrupt military or religious elites, wars, disasters, disease and climate (Collier's traps) keep countries poor whatever their history.
 - **The missing-pieces probe:** culture (modernisation theory: values and institutions), gender (patriarchy) and ideas (post-colonialism) are left out by economic reductionism; Cuba and Tanzania show politics can change outcomes.
 - **The evidence probe:** "dependency", "neo-colonialism" and "semi-periphery" are hard to measure, so the theory is hard to test; colonial rule also brought some infrastructure (Goldthorpe).
4. **Compare theories:** Wallerstein fixes some of Frank's weaknesses (countries can move up), and modernisation explains success stories, but ignores history.
5. **Judge:** for example, capitalism and colonial history explain the shape of the world economy and why many former colonies stay dependent, but they explain less well why countries in similar positions end up so differently.

Variants.

- **Old Paper 3 "overpopulation is the main cause"** [16]: Malthus for the view; against it, poverty causing high birth rates, the demographic transition, rich countries' consumption, and Marxist, modernisation and environmentalist explanations as rivals.
- **Old Paper 3 "all societies are moving towards the same stage"** [16]: modernisation (Rostow) and convergence (Kerr) for; dependency and world systems theory, China's different path, and countries going backwards against.
- **"Economic forces over which poorer countries have little or no control":** dependency theory fits the wording exactly (terms of trade, debt, TNCs), but evaluate with countries that took control of their path (South Korea's state-led growth) and internal factors.

3. Evaluate how far transnational organisations or aid reduce poverty (essay) (6 questions)

Asked as: transnational organisations: unsuccessful in reducing global poverty (1), contributed to more global inequality (1), successful in improving life chances (1), helped to reduce global inequalities (1); aid programmes: ineffective in reducing poverty (2).

1. **Define and sort.** Name the five groups (alliances of governments, money and trade bodies, NGOs, partnerships, TNCs) or the types of aid. Using several groups is what lifts an answer; TNCs alone are not enough.
2. **Make the case for success** from the "Real achievements" list, grouped by what the organisations deliver (money, health, projects, skills, global goals, coordination), with Sachs and modernisation theory as the theory.

3. **Make the case for failure** with the four "whose" questions (rules, money, priorities, hands), plus Hancock, TNCs taking profits out, Hayter and Moyo, and dependency and world systems theory on the untouched structure.
4. **Distinguish** between types of organisation and of aid: specific health and water programmes have the strongest record; loans with conditions and general cash the weakest.
5. **Judge**: transnational organisations have improved many life chances, especially in health, but have done less to change the structures that produce inequality.

Variants.

- **Aid only** (2 questions): sort aid by type first, then use the "Aid: types and the debate" arguments, separating short-term relief from long-term development.
- **"Contributed to an increase in global inequality"**: the critical case becomes your main argument; the achievements become your evaluation.
- **"Improving life chances"**: organise the evidence by income, education and health, the three life chances.

4. Explain a development idea (old Paper 3, 9 marks) (2 questions)

These came only in the old syllabus (June 2021 Paper 3); the current Paper 4 has no short parts. Answer an "Explain" question with about three developed points, each with a concept and an example.

1. **How development can be measured**: economic indicators (GDP or GNI per head) and their limits; social indicators (life expectancy, infant mortality, literacy); the HDI as a composite and its limits; Western bias in the idea of development (Sen, Gross National Happiness).
2. **How colonialism may affect development**: extraction of resources and labour, cash crops and dependence on exports, destroyed local industries, arbitrary borders and conflict, continuing neo-colonialism; with a contrasting functionalist or modernisation point that colonial rule also left infrastructure and institutions (Goldthorpe).

5. Evaluate poverty as the cause of global crime (essay) (2 questions)

Global (transnational) crime is crime that crosses national borders: drug trafficking, people trafficking, money laundering, cybercrime, arms smuggling, green crime and corporate crime.

1. **For poverty as the main cause**: poor farmers grow coca (Colombia) or opium (Afghanistan) because it pays more than food crops; poverty and war push people to migrate, which feeds people smuggling and trafficking; poor people are recruited by criminal networks for cybercrime or as drug couriers; sex tourism preys on poor women and children; Wallerstein's periphery offers cheap recruits for criminal networks based in richer countries.
2. **The poor as victims, not just offenders**: trafficked workers, the targets of sex tourism, and communities harmed by **green crime** such as the **Bhopal** gas disaster of 1984 at a Union Carbide pesticide plant in India, or oil pollution in the Niger Delta.
3. **Other causes** (your evaluation):

- **Castells'** network society: the container ships, internet links and electronic banking built for legitimate global business serve smugglers and fraudsters just as well, so crime grows with the networks themselves, whoever is poor. **Glenny** (*McMafia*) traced how criminal networks grew with open markets.
 - **Deregulated finance** makes money laundering, tax evasion and fraud easier; much of this is crime by the wealthy.
 - **Corporate and green crime** by TNCs that break safety and environmental laws in poor countries.
 - **Weak or corrupt states**, wars and conflicts, and rich governments' failure to police their own corporations.
 - Neoliberals argue trade has strengthened many poor economies, so a growth in crime cannot be blamed simply on globalisation making the poor poorer.
4. **Judge:** poverty supplies many of the people and the motives for global crime, but the networks, the money and many of the most damaging crimes come from the rich world and global capitalism.

Worked examples

Each example is a new 35-mark essay. The marks are given the way the levels mark scheme works: by assessment objective and level, not by points. In the exam, write each bullet as a full paragraph.

Example 1

'Globalisation has improved the life chances of people in developing countries.' Evaluate this view. [35]

Introduction. Life chances are the chances of a long, healthy life, schooling and a decent income. Neoliberals and modernisation theorists think globalisation has raised them; Marxist, feminist and post-colonial writers think the gains are thin and unequal.

For the view (AO1/AO2).

- **Income:** extreme poverty fell from well over a third of the world's people in 1990 to under a tenth by 2019, most of all in China; factory jobs and remittances raise household income (Bhagwati, Kabeer).
- **Health:** life expectancy rose from about 64 to about 73 between 1990 and 2019; Gavi and the Global Fund spread vaccines and drugs; smallpox was eradicated.
- **Education:** global goals and debt relief helped countries scrap fees and expand schooling; the number of children out of primary school roughly halved after 2000.

Against the view (AO3).

- **Unequal gains:** Milanovic's elephant curve shows the poorest gained least; the number of extremely poor people in sub-Saharan Africa rose; elites and the urban middle class gained most.
- **Costs inside the gains:** sweatshop conditions (Rana Plaza), structural adjustment fees for schools and clinics, drug patents, the brain drain of doctors and nurses.
- **Gender:** women's gains come with low pay and a double burden (Elson and Pearson, Mies).

- **Cause or coincidence?** Some improvements came from national governments' own policies (Kerala, Cuba), not from globalisation.

Conclusion. Average life chances have improved in most developing countries during globalisation, especially in health, but the gains are unequal between and within countries, and some are the result of national choices rather than global markets.

How it would be marked. Life chances in income, education and health with named thinkers and real figures (AO1 7–9), each point tied back to "improved life chances" (AO2 10–11), and sustained weighing of who gains and why to a supported verdict (AO3 12–15).

Example 2

'Patriarchy is the main cause of global inequality.' Evaluate this view. [35]

Introduction. Patriarchy is male dominance in society. The view comes from feminist sociology; Marxist, post-colonial and modernisation theories offer rival causes.

For the view (AO1/AO2).

- **Invisible work:** unpaid care and farm work, mostly by women, is not counted in GDP; Boserup showed development schemes favouring men.
- **Cheap labour:** Elson and Pearson's "nimble fingers"; Enloe on women's low-paid work in trade and tourism; Mies on women's work treated as free.
- **Life chances:** the feminisation of poverty; Sen's 100 million missing women; girls kept out of school.

Against the view (AO3).

- **Between countries:** patriarchy exists in rich and poor countries alike, so it cannot explain on its own why some countries are rich and others poor; capitalism (Frank, Wallerstein) and colonial history explain the gap between countries better.
- **Change:** gender gaps in schooling and life expectancy have narrowed in many developing countries without closing the gap between countries.
- **Marxist feminists:** capitalism uses patriarchy; the root is economic.
- **Modernisation theory and internal factors:** values, institutions, war and corruption (Collier).

Conclusion. Patriarchy shapes who is poorest within every country and makes global inequality worse, but it is better seen as one cause working alongside capitalism and colonial history than as the main cause of the gap between countries.

How it would be marked. Feminist explanations with named studies set against rival theories (AO1 7–9), applied to "main cause" and "global inequality" (AO2 10–11), and a comparison of causes that separates inequality within countries from inequality between them (AO3 12–15).

Example 3

'Non-governmental organisations do more to reduce global poverty than international financial institutions.'
Evaluate this view. [35]

This is the hardest kind: every paragraph must compare the two.

Introduction. NGOs (Oxfam, WaterAid, BRAC) are independent charities; international financial institutions (the World Bank and IMF) lend money to governments. The question is which has had more effect on poverty.

For the view (AO1/AO2).

- **Close to the poor:** NGOs work with local communities on water, farming, schooling and health, with visible results (WaterAid, BRAC, the Grameen Bank's loans to women); Easterly's "searchers".
- **The financial institutions' record:** structural adjustment cut school and health spending (Stiglitz); voting weighted to rich countries; Marxists see them as serving capital.

Against the view (AO3).

- **Scale:** World Bank lending for infrastructure and debt relief through HIPC is far larger than any charity's budget; roads, power and ports support growth that cuts poverty for millions.
- **NGO limits:** dependence on Western government funding, overhead costs (Hancock), short-term relief, projects that stop when funding ends.
- **Neither touches the structure:** dependency and world systems theory say both treat symptoms.
- **Working together:** much NGO work is funded through the same international bodies, so the comparison is partly false.

Conclusion. NGOs often do more per dollar for the poorest communities, but the financial institutions shape whole economies; their impact on poverty has been both larger and more harmful, depending on the policy.

How it would be marked. Both kinds of organisation explained with examples and theory (AO1 7–9), a comparison kept up throughout (AO2 10–11), and a reasoned verdict on scale against effectiveness (AO3 12–15).

Common mistakes

- **Talking about poverty or inequality without globalisation, or globalisation without inequality.** Examiners report answers that discuss poverty in general, or list features of globalisation, without linking the two. Every paragraph must connect the cause in the question to its effect on poverty or inequality.
- **Not saying which groups.** In "who benefits" questions, a list of globalisation's good and bad points earns little unless each point is pinned to the people it affects. Name the groups: elites, TNC owners, the urban middle class, rural poor, women, migrants, particular countries.
- **Describing aid instead of judging it.** Explaining what the World Bank or Oxfam does is only the starting point; marks come from showing whether it cut poverty. Every description needs a "did it reduce poverty, and why?" sentence.

- **Only discussing TNCs** in a question about transnational organisations. Include the UN, World Bank, IMF and NGOs.
- **No theory.** Answers built on assertions ("aid gets stolen", "TNCs exploit people") without dependency theory, modernisation theory, world systems theory or named studies stay in the low levels.
- **A few simple economic points.** Strong answers cover several aspects of globalisation (economic, political, cultural, environmental) and contrast winners such as China or South Korea with the poorest countries that have gained little.
- **Global crime answers about crime in general.** Focus on crime that crosses borders, cover several types, and explain their causes.
- **One-sided answers.** Many middle answers support the view with only a brief look at counter-arguments; AO3 is worth 15 of the 35 marks.

How to get the marks

- **"Evaluate this view" (35 marks):** one long essay, marked by levels for each assessment objective.
- **AO1 knowledge and understanding (9):** the top level (7–9) needs a range of detailed points with good use of concepts and theory or research. Use the key terms (life chances, neo-colonialism, structural adjustment, core and periphery, post-colonialism, feminisation of poverty) and name thinkers.
- **AO2 interpretation and application (11):** the top level (10–11) needs material that is accurate and **consistently applied to the question**. Keep returning to its words, and use real countries, organisations and programmes as application.
- **AO3 analysis and evaluation (15):** the top level (12–15) needs evaluation that is **explicit, detailed and sustained**, with contrasting views showing how complex the issue is. An outline of the other side that is only implicitly linked to the view stays in the 4–7 band; explicit evaluation that is not kept up reaches 8–11.
- **Distinguish** between kinds of developing country (fast-growing Asian economies versus the poorest countries), kinds of organisation and kinds of aid. Examiners reward this as a way of adding depth.
- **Answer two questions from different sections** (Globalisation, Media, Religion); the paper is out of $2 \times 35 = 70$. Number each answer clearly.
- **Sociological material** for this topic: Weber, Sen, Bhagwati, Milanovic, Kabeer, Sklair, Stiglitz, Hancock, Sachs, Hayter, Moyo, Easterly, Frank, Wallerstein, Nkrumah, Goldthorpe, Fanon, Said, Spivak, Escobar, Boserup, Mies, Elson and Pearson, Enloe, Rostow, Parsons, McClelland, Collier, Malthus, Kerr, Castells and Glenny.

Quick check

1. Which three things does the Human Development Index combine, and give one weakness of using GDP per head to compare countries.
2. Give two ways globalisation may harm health in developing countries.
3. Explain what is meant by neo-colonialism and give two of its forms.
4. What is the difference between the MDGs and the SDGs?

5. Give one argument from post-colonial theory and one from feminist theory about why global inequality persists.

Answers

1. Life expectancy, education (years of schooling) and income (GNI per head). Any one weakness of GDP per head: it is an average that hides how income is shared; it ignores unpaid work and the informal economy; it says nothing directly about health or education.
2. Any two: drug patents keep medicines expensive; doctors and nurses migrate to rich countries (brain drain); TNCs market tobacco and unhealthy food; pollution and climate change hit poor countries hardest; diseases spread faster; structural adjustment cut health spending.
3. Neo-colonialism (Nkrumah) is control of poor countries by rich ones without direct colonial rule. Forms: TNCs taking profits home, unequal terms of trade, debt, and aid or loans with conditions.
4. The eight MDGs ran from 2000 to 2015 and focused on poverty, schooling and health in developing countries; the seventeen SDGs run from 2015 to 2030, apply to all countries and add aims such as climate action and reducing inequality.
5. Post-colonial: Western ideas still define what "development" means and dismiss local knowledge (Said, Escobar), so policies designed by outsiders often fail. Feminist: women's unpaid and low-paid work is ignored or exploited (Boserup, Elson and Pearson), so half the population is held back.

Past questions to try

- 9699/43/O/N/24 Q2: essay on whether developing countries are kept poor by a capitalist world system.
- 9699/42/M/J/24 Q1: essay on whether transnational organisations have increased global inequality.
- 9699/41/M/J/23 Q2: essay on whether globalisation is reducing poverty in developing societies.
- 9699/43/O/N/22 Q1: essay on whether poverty in developing societies is the main cause of global crime.