

A stylized world map composed of a grid of grey dots, with several dots highlighted in red. The map is centered on the Atlantic Ocean.

Thinking Ahead

Development Models and Indicators of Well-being Beyond the MDGs

JENS MARTENS

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- With the 2010 MDG Summit, the discussions on the future of the Millennium Development Goals and the development agenda after 2015 have gathered momentum. Basically, there are three options for the future of the MDGs: retaining the goals – introducing new indicators; retaining goals – introducing new goals; defining new models and goals of well-being and social progress.
- With their primary focus on income poverty and basic social services, the MDGs reflect the smallest common denominator in development policy that was possible at international level ten years ago. They meant a retrograde step compared to more comprehensive concepts of sustainable development.
- Therefore, a fundamental review is required of the predominant development concepts as well as a discussion of alternative models and indicators of development and social progress. The limits of a development model have become apparent that primarily opts for economic growth to combat (income) poverty while giving too little attention to distribution, environmental, gender and human rights aspects.
- It is of key importance to overcome weaknesses of the existing MDG approach, namely the imbalance between the goals and commitments for the poor and the rich countries as well as the blindness of the existing MDGs towards distribution of wealth and income. Poverty and wealth must not be viewed as isolated but interdependent phenomena. This needs to be reflected as a key issue in any future catalogue of global development goals.



Table of contents

1. Introduction	2
2. Deficits and weaknesses of the MDG approach	2
2.1 Selective definition of goals	2
2.2 Definition of targets hardly ambitious	2
2.3 One-dimensional definition of poverty	3
2.4 Methodical problems in measuring poverty	4
2.5 Quantity ahead of quality	5
2.6 Blindness towards distribution issues	5
2.7 No measurable goals for the North	5
2.8 Conclusion: a narrowed understanding of development	6
3. The future of the MDGs: new indicators – new goals – new models	6
3.1 Option 1: Retaining the goals – introducing new indicators	7
3.2 Option 2: Retaining goals – introducing new goals	7
3.3 Option 3: Defining new development models and goals	8
4. Projects of »alternative« models and measures of well-being and development	9
4.1 Alternative development ideas: a short history	10
4.2 How Nobel Prize Laureates measure social progress:	
The Report of the Stiglitz-Sen-Fitoussi Commission	12
4.3 Happiness does not cost the Earth: the Happy Planet Index	13
4.4 Buen Vivir for All instead of Dolce Vita for Few	14
5. Outlook	15

1. Introduction

Over the years since the Millennium Summit, the MDGs have proved to be an instrument of development policy that is both effective as publicity and suitable for campaigns. They are easy to understand and to communicate to a broader public. The civil society and UN campaigns on the MDGs have contributed to enhancing public awareness of the problems of poverty and hunger in the countries of the South – including not only those people especially concerned with development.

Under the guiding motto of the MDGs, the UN, IMF, World Bank and OECD have overcome inconsistencies among their diverging development concepts and strategies – or at least they have managed to cover them up.

Thanks to their unambiguous quantitative and time-bound targets and the political commitments they entail, the MDGs provide a set of instruments to increase accountability of governments towards the people and check the effectiveness of their policies – in North and South.

However, the last ten years have also shown up the problems linked to focusing the development discourse on combating the most extreme forms of income poverty and hunger and providing basic social services for the population. The MDGs bear a number of weaknesses and deficits resulting in terms of both their conception and their implementing strategies. The discussion about the Post-2015 Development Agenda, i.e. about the question what the future of the MDGs is going to look like after the year 2015, will have to yield answers to these weaknesses and deficits.

2. Deficits and weaknesses of the MDG approach

2.1 Selective definition of goals

The eight general development goals with their 21 targets cover a mere fraction of the topics with which the governments dealt with at the development conferences of the 1990s. Neither do they reflect the range of topics addressed by the Millennium Declaration. Above all the latter's chapters on human rights, democracy and governance have not been given consideration in the MDG catalogue.

But partly, their choice has also been highly selective in those areas for which the governments defined concrete goals. For example, out of the goals of the UNESCO »Education for All« initiative and the World Education Forum in Dakar in 2000, only the goal of general primary school education was taken up in MDG 2, while regarding gender equality, all that is left in MDG 3 is eliminating the gender imbalance in primary and secondary schools, and MDG 7 reduces the wide range of topics of the Rio Conference, with its Agenda 21, to what appears to be a randomly cobbled together handful of targets.

This selective choice is also problematic because it could be pushing other objectives that are just as important into the background, too. In the education sector, the consequence is that financial resources and political attention are being focused on the primary school sector, whereas the secondary schools as well as the training and further education of young adults are wantonly neglected. As a result, while the world-wide school enrolment rate has risen to 87 percent, the share of African children attending secondary schools after primary education is a mere 27 percent. In South and West Asia, it is 46 percent, and in the Arab countries 57 percent (UNESCO 2010, Charts 5 and 8). Instead of restricting targets to a selective development goal, education experts therefore call for a return to a holistic and comprehensive concept comprising all stages ranging from pre-school education to adult education and also considering qualitative aspects of education.

One of the main reasons for the MDGs being so selective is the lack of political consensus among governments, who were able to agree on general declarations of intent in many thematic fields, but not on measurable goals in combination with concrete timeframes. However, in some of the thematic areas (education, for example), such development goals going beyond the MDGs do exist that could be adopted in the MDG catalogue without any problem. The governments demonstrated that this is indeed possible in 2007, when, for example, they extended the list by targets in the field of reproductive health and the treatment of HIV/AIDS.

2.2 Definition of targets hardly ambitious

Most of the quantitative targets are not nearly as ambitious as some statements by governments and by the

United Nations would have it. This applies in particular to halving the share of people whose income is less than 1.25 US dollars a day by 2015. For even if this goal is achieved, according to World Bank estimates, by 2015, more than a billion people will still be living in extreme poverty world-wide.

Many of the quantitative development goals in the UN resolutions of previous years went further and were to be achieved more quickly. Moreover, the period set for implementing the goals has been extended from 15 to 25 years by defining 1990 instead of 2000 as the base-line year for the calculations. But since the share of extremely poor people had already rapidly declined in China during the 1990s, the entire region of East Asia and the Pacific already reached the first Millennium Goal by 2000 – the year in which the governments had just defined it in the Millennium Declaration.

The governments have also watered down further-reaching development goals with the subtle trick of reducing shares instead of absolute numbers in the MDG context. For example, at the World Food Summit in Rome in 1996, they had pledged to halve the **number** of undernourished people compared to the level then (823 million) by 2015 at the latest. This meant bringing the number of people suffering from hunger down to 412 million. Four years later, in the Millennium Declaration, the governments agreed to reduce not the number but the **share** of people suffering from hunger by half. In practice, this slight change in phrasing means that in 2015, the governments will be politically accepting 170 million people more suffering from hunger. For given population growth, a halved share of people suffering from hunger in 2015 still means an estimated 582 million people. This argument continues to hold in spite of the number of people suffering from hunger owing to the global economic and food crisis having risen to an all-time high of more than a billion people in 2009.

2.3 One-dimensional definition of poverty

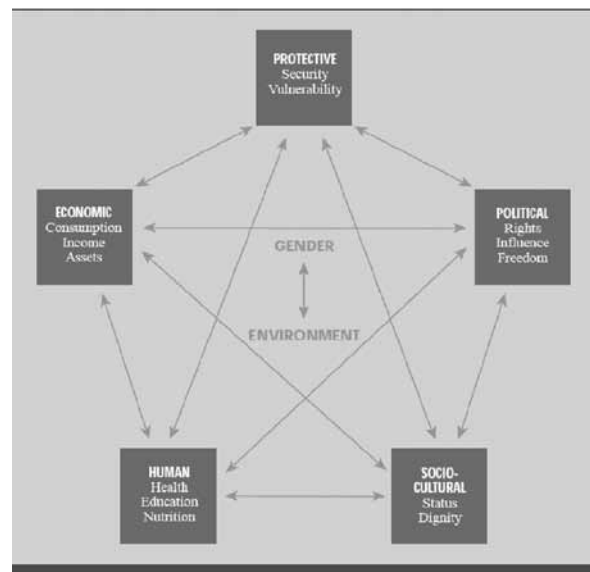
The MDGs above all define poverty as income poverty. At the World Social Summit in 1995, the governments had already got beyond this. According to the programme of action of this summit, poverty has *»various manifestations, including lack of income and productive resources sufficient to ensure sustainable livelihoods;*

hunger and malnutrition; ill health; limited or lack of access to education and other basic services; increased morbidity and mortality from illness; homelessness and inadequate housing; unsafe environments; and social discrimination and exclusion. It is also characterized by a lack of participation in decision-making and in civil, social and cultural life.« (UN 1995, para. 19)

At the time, the governments were applying a broad definition of poverty guided by the concept of Amartya Sen. According to him poverty had to be understood as *»the deprivation of basic capabilities rather than merely as lowness of incomes.«*¹

In 2001, the OECD was already following Amartya Sen’s concept in its guidelines on combating poverty, too. It refers to five dimensions of poverty and well-being only two of which, the dimensions of economic and human capabilities, are covered by the MDGs (Diagram 1; OECD 2001: 39).

Diagram 1: Dimensions of Poverty and Well-being



Source: OECD 2001: 39.

However, if poverty is above all understood as income poverty, then the recipes to reduce poverty will often focus on the monetary level. It is for this reason that economists like Jeffrey Sachs advocate an enormous inflow of foreign capital into the poorer countries in order to jumpstart economic growth. In contrast, structural is-

1. Quoted in Social Watch 2005: 14.

sues like the unequal distribution of assets, landed property and political power in these countries as well as the economic and geopolitical framework conditions remain largely eclipsed for many protagonists of a development approach based on modernisation theory. However, an incomplete diagnosis of a problem will inevitably result in the wrong political recipes and tend to be an obstacle to any lasting solution to the problems.

In its Report on the World Social Situation 2010, the United Nations questions in principle a definition of poverty that has been reduced to economic indicators and calls for a significantly more comprehensive approach: *»There is more to poverty than just insufficient income. In fact, a higher proportion of the populations of most countries would be perceived as living in poverty if other aspects of deprivation were taken into account. This calls into serious question the usefulness of approaches to poverty reduction that focus on »poor people« identified by the dollar-a-day measurement. A more encompassing approach should be adopted towards provision of essential social services such as basic health care and primary education, safe water and sanitation, and basic social protection.«* (UN 2009: 154)

2.4 Methodical problems in measuring poverty

A further weakness of the MDGs is the unsolved problems in measuring poverty. The original indicator of extreme poverty (per capita income of less than one US dollar a day) may have been excellent to communicate, but its level as a threshold value for extreme poverty proved to be by far too low for many regions of the world. As a consequence, in its revised poverty estimates of August 2008, the World Bank put the threshold for extreme poverty at 1.25 US dollars (Chen/Ravallion 2008). Thus the official number of people in extreme poverty rose overnight, by 500 million to about 1.4 billion people. In its poverty estimates for 16 Asian countries, the Asian Development Bank even sets an average threshold value of 1.35 US dollars (Asian Development Bank 2008).

Scholars such as Sanjay G. Reddy and Thomas W. Pogge of New York's Columbia University have voiced general criticism of the poverty measure applied by the World Bank. One of the aspects they question is the World Bank's practice of expressing the reference value for ex-

treme poverty in purchasing power parities (PPP). This is intended to make the national data comparable. Theoretically, with one PPP dollar the same amount of goods and services can be bought in every country of the world. However, the definition of the purchasing power parities is based on international baskets of goods that have little to do with what the poor consume. For there is only low demand among the poor for the services referred to for the baskets, which are often very cheap in the developing countries (e.g. domestic help). Their consumption is focused on staple foods traded world-wide (rice, grain, etc.) the prices of which differ comparatively little between rich and poor countries.

Pogge and Reddy summarise their criticism of the World Bank approach on poverty in the following three points: *»The first is that the Bank uses an arbitrary international poverty line that is not adequately anchored in any specification of the real requirements of human beings. The second problem is that it employs a concept of purchasing power »equivalence« that is neither well defined nor appropriate for poverty assessment. These difficulties are inherent in the Bank's »money-metric« approach and cannot be credibly overcome without dispensing with this approach altogether. The third problem is that the Bank extrapolates incorrectly from limited data and thereby creates an appearance of precision that masks the high probable error of its estimates. It is difficult to judge the nature and extent of the errors in global poverty estimates that arise from these three flaws. (...) however, (...) there is some reason to believe that the Bank's approach may have led it to understate the extent of global income poverty and to infer without adequate justification that global income poverty has steeply declined in the recent period.«* (Pogge/Reddy 2005: 2)

Measuring poverty is indeed complicated by a lack of accurate statistics. In several countries, reliable data is neither available on the number of people suffering from hunger nor on maternal mortality, the spread of HIV or the number of people dying of malaria each year. According to World Bank statements, there are not even any reliable statistics on the development of income poverty in 78 out of 149 developing countries and emerging economies, and thus in more than 50 percent of these countries (World Bank 2008: 22).

Governments and international organisations are fully aware of this deficit. For some years, they have been

seeking to improve capacities to establish economic and social data in the developing countries. In 2004, they adopted the *Marrakech Action Plan for Statistics (MAPS)* for this purpose, and in the following years, National Strategies for the Development of Statistics were created in more than 100 countries – at least one positive side-effect of the MDG Process.

2.5 Quantity ahead of quality

The MDGs and their indicators concentrate on quantitative targets and ignore qualitative aspects to a large degree. Thus they may be suggesting progress that, when a closer look is taken, has not really been made. This applies not only to the goals of reducing income poverty and hunger.

MDG 2, aimed at establishing universal primary school education for all children by 2015, is one example of this. While higher school enrolment rates are no doubt desirable, they say nothing about the quality and the results of lessons. Surveys show that in many countries of the South, there is a considerable discrepancy between the share of children who enrol and the share of children graduating from primary schools who can actually read and write. If the number of well-trained teachers does not increase by at least the same volume as the number of schoolchildren, this will result in overcrowded classrooms in which the children are at best cared for but not sustainably educated. This would have to be considered in any future set of MDG indicators.

The same applies to MDGs 4 and 5 on the reduction of child and maternal mortalities. While quantitative targets for reducing mortality rates no doubt make sense, these targets give no indication of the living quality of mothers and children or their risk of contracting diseases or suffering other possible damage to health.

2.6 Blindness towards distribution issues

The distribution of income, land and assets in a society does not play any role within the MDG catalogue. Only among the indicators of MDG 1 are there two (poverty gap ratio and the poorest fifth's share of national consumption) referring to distribution aspects.

By no means, however, do reducing poverty and inequality go hand in hand. According to the World Bank, since the 1980s the unequal distribution of income (measured by the Gini coefficient) had risen in several countries (World Bank 2008: 35, 40). Out of the 59 countries that figures were available for, 42 had recorded an increase in unequal distribution. Only in 15 countries had the wealth gap between poor and rich become smaller. Social disparities had grown in particular in China and India, in which the share of people living in extreme poverty had significantly dropped.

In its Report on the World Social Situation 2010 the United Nations stresses the central importance that the distribution of income and assets has in overcoming poverty. The greater the extent of inequality and exclusion in a society, the less the poor will benefit from higher economic growth rates. The UN concludes: »A high premium must be placed on interventions that correct inequalities in the initial distributions of assets, including human resources, in an egalitarian manner in order to foster more inclusive growth.« (UN 2009: 154)

2.7 No measurable goals for the North

One key weakness of the MDG catalogue is its imbalance between the goals and commitments for the countries of the South and the North. Wherever the Millennium Goals contain precise prescriptions referring to quantity and timeframes, they relate almost exclusively to sectoral development processes in the South (education, health, etc.). Thus the main responsibility for achieving these goals is assigned to the governments of the South. In contrast, the specific responsibility of the North for the achievement of these goals is only vaguely referred to in Goal 8.

For example, the commitment of the developing countries to halve the number of people suffering from hunger by 2015 is clearly referred to; an equivalent commitment on the part of the industrialised countries to make their necessary contribution to this (providing the finance required, eliminating agricultural export subsidies, etc.) lacks.

The richer countries have entered a number of unilateral commitments over the last few years that are linked to measurable timebound targets. The most prominent ex-

ample here is the EU's timetable of 2005 to raise average ODA among its members to 0.56 percent of GNI by 2010 and 0.7 percent of GNI by 2015. So far, however, these goals have not been officially included in the MDGs.

The double standards in assigning responsibilities have caused some politicians and civil society representatives from the South to continue to view the MDGs as a product of the rich donors with which the latter are diverting attention from their being mainly responsible for the international framework conditions of poverty eradication and development.

2.8 Conclusion: a narrowed understanding of development

Reducing the development discourse to a small number of quantitative goals and targets especially in the field of poverty eradication and basic social services, bears the danger of a political abandonment of more comprehensive development approaches. For de facto, structural framework conditions are touched just as little by the goals as the environmental dimension of development. While MDG 7 does have the topic of »environmental sustainability«, the corresponding targets and indicators give the impression of a randomly cobbled together conglomeration and do not reflect a holistic sustainability approach such as the one that the 1992 Rio Declaration was based on. In the Final Document of the UN Conference on Environment and Development, the then governments stressed not only the interdependence of the economic, environmental and social dimensions of development but also the special responsibility that the industrialised countries bear and the need for changes in the consumption and production patterns in these countries. The MDGs no longer make any mention of this.

The MDGs do not take into account that the lifestyle of the people in the North, with its impacts on climate change and biodiversity, has grave consequences for the survival and living conditions of the people in the South. And yet it is those people living just above or below the poverty line who are particularly vulnerable to the impacts of climate change. In spite of this, the MDGs contain no binding targets for the reduction of emissions that harm the climate, especially CO₂, and for an increased use of renewable energies.

Gender aspects are given too little attention in the MDG discourse as well. Although the third Millennium Goal is to »Promote Gender Equality«, the targets deduced from it do not adequately reflect the complex problems of discrimination and social exclusion of women – in spite of a later supplement to the MDG list containing universal access to reproductive health.

The shortcomings of the MDGs are related to the failure of the dominant model of development and economic progress that is oriented on a modernization approach, that is blind to environmental and human rights aspects, that confuses economic growth with progress in society, and that regards poverty as a primarily technical challenge in which categories of inequality and social justice are neglected.

Against this background, more and more voices in the debate over the future of the MDGs are calling for a general review of the predominant development paradigm and the measures of well-being and social progress linked to it. The United Nations, too, in its Report on the World Social Situation 2010 demands: *»It is time to open up a discourse on poverty reduction that centers on inclusive development and the ending of social exclusion. This requires focusing on the development process as one of structural change and transformation.«* (UN 2009: 156)

3. The future of the MDGs: new indicators – new goals – new models

With the 2010 MDG Summit, the discussions on the future of the MDGs and the development agenda after 2015 have gathered momentum. Politics, science and civil society now have five years' time to deliberate whether the pursuit of goals that have not been achieved should be continued after 2015 or alternative goals should be defined – and if so, which ones. Or will the phase of internationally agreed development goals and action programmes soon be a thing of the past, just like the era of socialist five-year plans?

Basically, there are three options for the future of the MDGs:

3.1 Option 1: Retaining the goals – introducing new indicators

»The future of the MDGs are the MDGs,« says Eveline Herfkens, former Executive Co-ordinator of the UN Millennium Campaign.² The fact that the percentage of people suffering from hunger in the world may not have been halved or that attempts to lower the infant and maternal mortality rate may not have been successful by 2015 cannot be a reason to abandon these goals. They will also stay relevant after 2015. For the governments, this would mean retaining the goals and extending the deadline for their implementation by another ten or 15 years.

New goals would not be adopted in the MDG catalogue in order not to jeopardise its straightforwardness and hence its suitability for the media and political communicability. However, it would make sense to supplement the 60 indicators with which the implementation of the MDGs has so far been measured with more meaningful indicators. For example, MDG 1 could contain an additional indicator measuring income distribution in a country (e.g. the Gini coefficient). Gender equality (MDG 3) could be achieved by a detailed set of indicators in the manner that it is summarised, for example, in the Gender Equity Index of Social Watch.³ For MDG 7 (ensuring environmental sustainability), the governments could draw on the long-standing experience of the UN Commission for Sustainable Development (CSD), whose Secretariat published a list of 96 sustainability indicators including a detailed methodology for applying them in 2007.⁴

3.2 Option 2: Retaining goals – introducing new goals

The core set of MDGs in the area of poverty reduction and social development will continue to be of relevance after 2015. But it would be supplemented by additional goals or targets filling gaps in the existing MDG catalogue and putting the relevance of the goals to human rights into concrete terms.

2. Herfkens in a speech on the occasion of the International Conference „Beyond Crisis - The Future of Global Order(s)“ in Bonn on the 2nd July 2010.

3. Cf. www.socialwatch.org/taxonomy/term/527 (last accessed on 24.11.2010).

4. Cf. UN (2007) and the UN website on sustainability indicators www.un.org/esa/dsd/dsd_aofw_ind/ind_csdindi.shtml (last accessed on 24.11.2010).

For example, MDG 1 could be supplemented with the additional target of a *Global Social Protection Floor*.⁵ In accordance with the four cornerstones of this concept, the achievement of this goal could be measured with indicators such as the following four:

- Share of the population with affordable access to essential public health care.
- Percentage of children with guaranteed access to income or subsistence security, including access to nutrition, education and care.
- Percentage of persons in old age or with disabilities who receive a guaranteed basic pension.
- Share of working-age poor, under- and unemployed with guaranteed public income support.

MDG 2 could be supplemented by the targets of the »Education for All« Campaign of the UNESCO, out of the six goals of which just two are so far contained in the MDG catalogue (primary education for all children and elimination of gender disparities). The six goals are:⁶

Goal 1

Expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children

Goal 2

Ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to, and complete, free and compulsory primary education of good quality.

Goal 3

Ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life-skills programmes

Goal 4

Achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults.

5. Cf. on this e.g. Ehmke/Skaletz 2009: 5

6. Cf. www.unesco.org/en/efa/efa-goals (last accessed on 24.11.2010)

Goal 5

Eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015, with a focus on ensuring girls' full and equal access to and achievement in basic education of good quality.

Goal 6

Improving all aspects of the quality of education and ensuring excellence of all so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills.

In an initial step, the goal of gender equality (MDG 3) could be supplemented with targets that have already been adopted and, if necessary, be extended by indicators and deadlines. These include in particular the following targets agreed at the 2005 Summit:⁷

- Guaranteeing the free and equal right of women to own and inherit property and ensuring secure tenure of property and housing by women.
- Promoting women's equal access to labour markets, sustainable employment and adequate labour protection.
- Ensuring equal access of women to productive assets and resources, including land, credit and technology.
- Eliminating all forms of discrimination and violence against women and the girl child, including by ending impunity and by ensuring the protection of civilians, in particular women and the girl child, during and after armed conflicts in accordance with the obligations of States under international humanitarian law and international human rights law.
- Promoting increased representation of women in Government decision-making Bodies, including through ensuring their equal opportunity to participate fully in the political process.

There is a particular need to review the environmental targets under MDG 7. As yet, it completely lacks targets in the area of combating global warming and the use of renewable energies. This is why targets with a fixed

schedule should be adopted on reducing the per capita emissions of greenhouse gases, in particular carbon dioxide, and on increasing the share of renewable energies in a country's total energy consumption. The details of these targets are going to depend on the outcome of climate negotiations on a Post-Kyoto Agreement and the UN Conference on Sustainable Development in Rio 2012. For it would not make sense to develop separate environmental MDGs independently of these processes. But since these goals, unlike MDGs 1-6, do not primarily concentrate on development processes in the South, the question arises whether they should merely provide an extension to the existing MDG catalogue. As an alternative, in parallel to the MDGs, the governments could agree a new set of Global Development Goals (GDGs) that would apply to all countries equally. GDGs could cover the entire spectrum of Global Public Goods (GPGs). In the area of the *global commons*, these include, alongside the protection of the Earth's atmosphere and the climate, the conservation of biodiversity, the forests and the seas.

Finally, when extending the MDG catalogue, the governments could also respond to the weaknesses of MDG 8 and adopt measurable targets with a fixed schedule for the rich countries. After 2015 too, this will probably above all apply to the development of the international trade and finance system, public funding of development and foreign indebtedness.

Which concrete targets the governments are to agree in 2015 will depend on to what degree they have fulfilled the commitments they previously made – and what then remains to be done. For up to 2015, for example, the EU timetable to raise ODA to 0.7 of GNI is to be fulfilled; already by the end of 2013, the industrialised countries promised to have abolished their agricultural export subsidies in the context of the Doha Round; and already by the end of 2010, the targets of the Paris Declaration on Aid Effectiveness are to have been fulfilled.

3.3 Option 3: Defining new development models and goals

With their restricted focus on extreme poverty and basic social services, the MDGs reflect the smallest common denominator in development that was possible at international level ten years ago. They meant a retrograde

7. Cf. UN Doc. A/RES/60/1, para. 58.

step compared to more comprehensive concepts of sustainable development stressing the equal value of environmental, economic and social aspects of development as well as its human rights foundations.

However, also as a result of the global crises of the past years, the limits of a development model have become apparent that primarily opts for economic growth to combat (income) poverty while giving too little attention to distribution, environmental and human rights aspects.

Moreover, given the changes in the global economic and political power relations, which have been highlighted particularly by China's growing significance, dividing the world into two parts, a rich North and a poor South, has become more and more anachronistic. But this also raises the question what the point of globally formulated development goals is that are mainly relevant to a narrowly defined group of »poor« countries.

Against this background, merely extending the MDGs by a couple of additional targets and indicators would fall short of what is needed. Rather, a fundamental review is required of the predominant development concepts as well as a discussion of alternative models and indicators of development and social progress. Such a discussion would not remain confined to the processes of change in the traditional developing countries but would equally affect all the world's countries. It could draw on the discourses surrounding the World Summits on Environment and Development in Rio de Janeiro and on Social Development in Copenhagen, in which sustainability, poverty, employment and social integration were not regarded as internal affairs of the developing countries but as matters of the global community as a whole.

The result of such a debate could be an understanding of core elements of a new paradigm of development, well-being and social progress that is universally valid but simultaneously takes account of the specific framework conditions of the individual countries. On this basis, if required, new, differentiated goals and indicators could be formulated replacing the existing MDGs after 2015.

Such a process of rethinking the conventional development models by no means needs to start in square one. Rather, it can be based on the wide range of projects and discourses of the most recent past dealing with alternative measures of well-being, innovative indices

of happiness and well-being and holistic concepts of »good life« (*buen vivir*).

4. Projects of »alternative« models and measures of well-being and development

4.1. Alternative development ideas: a short history

»We are all in need of a redefinition of our goals, or new development strategies, or new lifestyles, including more modest patterns of consumption among the rich.«⁸

With this appeal, social and natural scientists and economists from all over the world addressed the global public at a symposium in Mexico's Cocoyoc – in October 1974. Since then, the Cocoyoc Declaration has been regarded as a key document of alternative development ideas. For the first time, it linked environmental and social aspects of development and called for a new definition of development goals beyond the categories of economic growth.

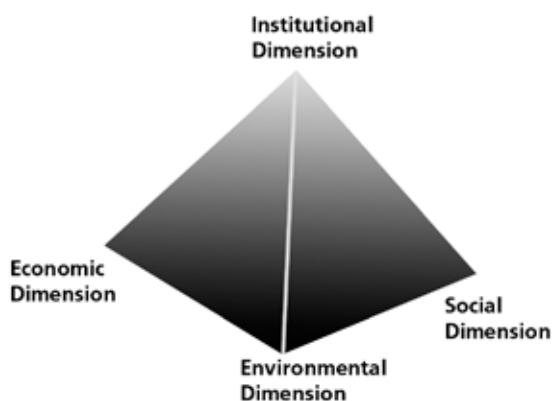
One year later, the Dag Hammarskjöld Report on Development and International Co-operation, under the title »What now: Another Development.« argued in a similar manner. Already at that time, for the more than 100 scientists and development politicians, among them today's ILO Secretary-General Juan Somavia, the concept of development could not be reduced to raising economic growth: *»Development is a whole; it is an integral, value-loaded, cultural process; it encompasses the natural environment, social relations, education, production, consumption and well-being. The plurality of roads to development answers to the specificity of cultural or natural situations; no universal formula exists.«* (Dag Hammarskjöld Foundation 1975: 7)

These thoughts formed the foundations of the concepts that later on, with the Brundtland Commission Report in 1987 and the Rio Conference in 1992, became popular under the catchword sustainable development. The core aim of the Rio approach was to stress the holistic char-

8. Quoted from: www.unep.org/Geo/geo3/english/045.htm (last accessed on 24.11.10)

acter of development by linking up the goals of environmental sustainability, social justice, economic efficiency and social participation and democracy (Diagram 2). One of the root causes of the global problems was seen to be the non-sustainable production and consumption patterns in the rich countries. The principle of common but differentiated responsibility for the preservation of the Earth's ecosystems anchored in the Rio Declaration was deduced from this.

Diagram 2: The four dimensions of sustainable development



So in the discussion over future development goals and concepts beyond the MDGs, there is certainly no need to reinvent the wheel. As a first step, it would be important to recall the – remarkably topical – ideas and guiding concepts of sustainable development that were formulated in the previous decades.

Definitions of the concept of development created under the auspices of the United Nations could provide additional clues. In particular, the Declaration on the Right to Development of 1986 is worth mentioning since it has a special normative significance, being an intergovernmental document. According to the definition in this Declaration, «(...) development is a comprehensive economic, social, cultural and political process (...), that aim[s] at the constant improvement of the well-being of the entire population and of all individuals, on the basis of their active, free and meaningful participation in development and in the fair distribution of the benefits resulting therefrom.»⁹

9. UN Doc. A/RES/41/128 of the 4th December 1986 (www.un.org/documents/ga/res/41/a41r128.htm; last accessed on 24.11.10)

The Human Poverty Index of UNDP (HPI)

HPI indicators for developing countries (HPI-1):

- **long and healthy life:** Probability at birth of not surviving to age 40
- **Knowledge:** Adult illiteracy rate
- **A decent standard of living:** Percentage of population not using an improved water source and percentage of children under weight for age.

HPI indicators for OECD countries (HPI-2):

- **A long and healthy life:** Probability at birth of not surviving to age 60
- **Knowledge:** Percentage of adults lacking functional literacy skills
- **A decent standard of living:** Percentage of people living below the poverty line
- **Social exclusion:** Long-term unemployment rate

With this Declaration, almost 25 years ago, the governments created a close link between the socioeconomic aspects of development and the defence of the political and civil as well as the economic, social and cultural human rights – thus providing the foundations for a rights-based development approach.

The Human Development Report published by UNDP played a pioneering role in deliberations on an extended concept of development. Since 1990, it has been advocating an extended understanding of »human« development based on the capability approaches of Economics Nobel Prize-Laureate Amartya Sen. On the occasion of the Report's twentieth anniversary, its authors reviewed the definitions of development to date and agreed on the following updated version: »*Human Development aims to expand people's freedoms – the worthwhile capabilities people value – and to empower people to engage actively in development processes, on a shared planet. And it seeks to do so in ways that appropriately advance equity, efficiency, sustainability and other key principles. People are both the beneficiaries and the agents of long term, equitable human development, both as individuals and as groups. Hence Human Development is development by the people of the people and for the people.*« (Alkire 2010: 40)

Prior to this, the core elements of the Report had been the Human Development Index (HDI) and the Human

Poverty Index (HPI), published since 1996. The Poverty Index was a novelty for two reasons: First, as the measure of poverty in the developing countries, it could make do without the indicator of income poverty, and second, with this index, UNDP was also presenting a poverty index for the rich (OECD) countries (Box).

However, in times in which it is becoming more and more difficult to draw a line between poor developing countries and rich industrialised countries, the application of different standards for these groups of countries is getting increasingly problematic.

Moreover, the UN Report on the World Social Situation 2010 points to the fact that despite all efforts on the part of UNDP and others, regarding the developing countries, poverty continues to be defined chiefly as income poverty. In contrast, the definition of poverty has changed several times in the countries of the North, and it has become increasingly differentiated. The Report noted: *»It is clear that these shifts of focus in discourse and practice—from absolute poverty to relative poverty, from income poverty to dimensional analysis, from poverty to well-being, and then to social exclusion—have profoundly altered the way deprivation is conceptualized, defined, measured, analysed, addressed and monitored. In contrast, in developing countries, the field is still dominated by a definition of absolute poverty in terms of income.«* (UN 2009: 45)

This statement points out that so far, the discourses on poverty, development and social progress in the northern and southern hemispheres have usually been held separately and by different actors. Poverty in the North and the South is seen as two separate phenomena that are measured by different indicators and analysed with different concepts. At the 1995 World Social Summit in Copenhagen, the governments made an exception by then describing poverty as a universal phenomenon becoming apparent in a variety of forms and affecting people world-wide.

The term »development« is traditionally only used for social and economic processes of change in Africa, Asia and Latin America and was only given a meaning through the »invention« of underdevelopment in the forties of the last century. Correspondingly, development goals such as the MDGs were only formulated for these countries, too. The concept of sustainable devel-

opment represented an exception. It was also applied to countries of the North, for example with the Report »Sustainable Germany« (BUND/Misereor 1996).

The sustainability discourse was also the starting point for the growing criticism of conventional measures of well-being and progress – especially the growth of Gross National Product (GNP) or (since 1999) Gross National Income (GNI). The insight is becoming more and more widespread that these indicators by no means automatically represent a sufficient measure of social progress. On the contrary: Often enough, conflicts in aims exist between economic growth and social progress or environmental sustainability. A mass pile-up on the motorway will result in an increased demand for new cars, and therefore economic growth – but hardly the individual well-being of those involved in the crash.

While this problem has already been discussed for decades in the context of the »greening« of economic sciences, it has only reached the mainstream discourse in politics and science in the most recent past. In just a few years' time, a large number of dynamic discussion processes have developed dealing with alternative models of well-being and progress indicators. They can contribute to overcoming the existing division in the discourse on development concepts and indicators between North and South and thus also to a new generation of universal development goals outside the MDGs that are not solely relevant to the poor countries of the South.

Three »projects« dealing with alternative well-being measures and development models from different perspectives are typical of the range in these approaches:

- The Commission on Measuring Economic Performance and Social Progress, headed by Economics Nobel Prize-Winner Joseph Stiglitz.
- The Happy Planet Index, developed by the UK's New Economics Foundation.
- The principle of *buen vivir* (good life), which has evolved in Latin America and is now anchored as an alternative concept of development in the constitutions of Ecuador and Bolivia.

These projects differ in terms of the social origin of their protagonists, their objectives and the results of their ac-

tivities so far. Nevertheless, despite all their differences, they do have the quest for better measures and models for social change and individual well-being in common.

4.2 How Nobel Prize Laureates measure social progress: The Report of the Stiglitz-Sen-Fitoussi Commission

In February 2008, French President Nicholas Sarkozy took the initiative to establish the Commission on the Measurement of Economic Performance and Social Progress. The 25-member commission was chaired by Joseph Stiglitz, with Amartya Sen acting as Chief Advisor and Jean-Paul Fitoussi as Co-ordinator of the Commission.¹⁰ The Commission members included distinguished economists and Nobel Prize Laureates such as Kenneth Arrow, Nick Stern and Kemal Dervis.

The starting point for the work of the Stiglitz-Sen-Fitoussi Commission was dissatisfaction with the traditional measures of economic performance and progress, above all the Gross Domestic Product (GDP) as an indicator. Against this background, it was the Commission's task to examine the limits of GDP as an indicator of progress, assess the feasibility of alternative measures and settle what statistical information was required to produce relevant indicators of social progress.

The Commission divided its activities into three thematic blocks: Classical GDP topics, quality of life, and sustainable development and environment. This division into three is also reflected in the Final Report of the Commission that was published in September 2009 (Commission on the Measurement of Economic Performance and Social Progress 2009).

Right from the start, the authors make it clear that while the Report addresses political decision-makers, it does not give recommendations on concrete political measures: »The report is about measurement rather than policies (...).« (Ibid: 9)

Nevertheless, the question what is to be measured is closely linked to the goals that a society defines. And depending on what goals are defined, they will entail different political measures required for their realisation.

From this angle, there are no »unpolitical« indicators of progress.

The key message of the Report is: »(...) the time is ripe for our measurement system to shift emphasis from measuring economic production to measuring people's well-being.« (Ibid: 12)

GDP is said to be completely unsuitable for measuring well-being. However, the authors do not draw the consequence from this of presenting concrete proposals for alternative indicators. Rather, their recommendations outline criteria that ought to be considered in formulating new indicators. Stiglitz and his colleagues summarise the Report's core statements in twelve general recommendations (Ibid: 12):

1. When evaluating material well-being, look at income and consumption rather than production.
2. Emphasise the household perspective.
3. Consider income and consumption jointly with wealth.
4. Give more prominence to the distribution of income, consumption and wealth.
5. Broaden income measures to non-market activities.
6. Quality of life depends on people's objective conditions and capabilities. Steps should be taken to improve measures of people's health, education, personal activities and environmental conditions. In particular, substantial effort should be devoted to developing and implementing robust, reliable measures of social connections, political voice, and insecurity that can be shown to predict life satisfaction.
7. Quality-of-life indicators in all the dimensions covered should assess inequalities in a comprehensive way.
8. Surveys should be designed to assess the links between various quality-of-life domains for each person, and this information should be used when designing policies in various fields.
9. Statistical offices should provide the information needed to aggregate across quality-of-life dimensions, allowing the construction of different indexes.
10. Measures of both objective and subjective well-being provide key information about people's quality of life. Statistical offices should incorporate questions to capture people's life evaluations, hedonic experiences and priorities in their own survey.

10. Cf. www.stiglitz-sen-fitoussi.fr (last accessed on 24.11.10)

11. Sustainability assessment requires a well-identified dashboard of indicators. The distinctive feature of the components of this dashboard should be that they are interpretable as variations of some underlying »stocks«. [...] Confusion may arise when one tries to combine current well-being and sustainability into a single indicator.
12. The environmental aspects of sustainability deserve a separate follow-up based on a well-chosen set of physical indicators. In particular there is a need for a clear indicator of our proximity to dangerous levels of environmental damage (such as associated with climate change or the depletion of fishing stocks.).

These recommendations of the Stiglitz-Sen-Fitoussi Commission appear to be more of a problem indicator than a problem solution. At various points in the Report, the Commission members point out that they were by no means always in agreement and that further discussions among them and with the different social groups are necessary at national and international level. In line with this, they conclude by modestly stating that: »*The Commission regards its report as opening a discussion rather than closing it.*« (Ibid: 18)

4.3 Happiness does not cost the Earth: the Happy Planet Index

With the Happy Planet Index (HPI), already in 2006, the London based New Economics Foundation (NEF) presented a radical counter-concept to the GDP as an indicator of economic and social performance. Not only with its name does it consciously follow up similar initiatives to measure social well-being. The most conspicuous example is the notion of Gross National Happiness, already developed by the King of Bhutan in the 1970s.¹¹

In 2009, the NEF published a revised, »2.0« version of the Index in which the authors describe the purpose of the HPI as follows: »*In an age of uncertainty, society globally needs a new compass to set it on a path of real progress. The Happy Planet Index (HPI) provides that compass by measuring what truly matters to us – our well-being in terms of long, happy and meaningful lives – and what matters to the planet – our rate of resource consumption.*« (New Economic Foundation 2009: 10)

11. Cf. www.grossnationalhappiness.com (last accessed on 24.11.10).

Correspondingly, the Happy Planet Index consists of three elements:

- **Life expectancy** at birth.
- **Life satisfaction**, typically measured with the following question: *All things considered, how satisfied are you with your life as a whole these days?* Responses are made on numerical scales, typically from 0 to 10, where 0 is dissatisfied and 10 is satisfied.
- The **Ecological footprint** as a measure of the amount of land an individual needs to provide for all resource requirements plus the amount of vegetated land required to sequester (absorb) all CO₂ emissions and the CO₂ emissions embodied in the products consumed. This figure is expressed in units of »global hectares«.¹²

So the Index combines indicators of sustainability and subjective life quality – thus doing precisely what the Stiglitz-Sen-Fitoussi Commission rejects for methodological reasons. On the basis of the three elements, the Index is formed by applying the following base equation:¹³

$$\text{HPI} = \frac{\text{Life expectation} \times \text{Life satisfaction}}{\text{Ecological footprint}}$$

In 2009, the HPI was established for 143 countries. Position 1 was given to Costa Rica, followed by the Dominican Republic, Jamaica, Guatemala and Vietnam. Burundi, Namibia, Botswana, Tanzania und Zimbabwe bring up the rear. China made it to position 20, Germany to position 51 and the USA to position 114.¹⁴ What is conspicuous is the high share of Central American and Caribbean countries in the top group. There are alone seven countries from this region in the Top Ten. They combine a comparably high level of life satisfaction with a comparably low ecological footprint.

The results show that it is by no means the countries with a high material living standard, measured against

12. The concept of the »ecological footprint« was developed by scientists Mathias Wackernagel and William Rees, see www.footprintnetwork.org (last accessed on 24.11.10).

13. The calculating methods are in fact rather more complicated; cf. on this the methodological annexes in New Economics Foundation (2009), pp. 52.

14. Cf. on this the detailed interactive map of the world at www.happyplanetindex.org/explore/global (last accessed on 24.11.10).

classical per-capita income, that land top of the list. The message that the NEF concludes from this is that an equally happy and environmentally friendly life need not cost the Earth.

However, a comparison of individual pairs of countries immediately reveals where the Index has its weaknesses: Iraq (position 79) is ahead of Norway (88), Belarus (104) ahead of Denmark (105) and Sudan (121) ahead of Luxembourg (122). This is only possible because the Index completely ignores categories such as human rights and cultural and political freedoms. The method to establish individual life satisfaction with one singly question in the context of a world-wide uniform opinion poll has also come in for strong criticism.

Finally, the inventors of the HPI themselves concede that its name is misleading. The Index is not a measure of people's happiness but rather measures how environmentally efficient the population's well-being is realised in a country.

Nevertheless, the HPI has played an important pioneering role and given politicians food for thought. It influenced discussions at the level of the OECD, especially of its global project »*Measuring the Progress of Societies*«¹⁵, and the initiative of the European Commission, »*Beyond GDP*«.¹⁶ The HPI approach is also interesting because it is applicable to and meaningful for all countries of the world – unlike the classical poverty and development indices.

The simplicity of the Index makes it easy to communicate to politicians and the media, but it also bears the danger of false interpretations and misleading conclusions. What political conclusions can be drawn from Germany's being way behind Cuba, Saudi Arabia or Burma in the HPI ranking?

The new Gross National Happiness Index (GNH-Index), developed in the Kingdom of Bhutan, could provide a more differentiated alternative.¹⁷ It comprises a compre-

hensive set of indicators from the following nine areas: 1. Psychological Well-being; 2. Time Use; 3. Community Vitality; 4. Cultural Diversity and Resilience; 5. Health; 6. Education; 7. Ecological Diversity and Resilience; 8. Living Standard; 9. Good Governance

»Gross National Well-Being« was enshrined in Bhutan's new constitution in July 2008 – a fact linking this concept with the Latin American *Buen Vivir* approaches.

4.4 *Buen Vivir* for All instead of *Dolce Vita* for Few

With the radical political changes in Latin America, a guiding concept of well-being has gained importance over the last few years that is linked to the concept of *Buen Vivir* (good life). This is not so much a development concept but a holistic life philosophy that has its origins in the world view of the indigenous peoples in the Andes region.

The *Buen Vivir* principle pursues the goal of material, social and spiritual satisfaction among all members of a society, but not at the cost of the other members and the natural resources. It thus dissociates itself from a purely materialistic Western-style concept of wealth.

Ecuadorian economist Alberto Acosta is an important mentor of the *Buen Vivir* principle. From 2007/2008, he was Energy Minister and President of the Constituent Assembly of his country. Acosta stresses that the *Buen Vivir* approach by no means represents a romanticising of indigenous living conditions or even a return to the Stone Age.¹⁸ The modernisation of society and the value of technological progress are not at all negated. However, the *Buen Vivir* concept does abandon the principle of development being a linear process from a starting point A to a later state B. As a consequence, the concept does not share the notion of »underdevelopment« that needs to be overcome. Rather, social progress is a process that is constantly newly constructing and reproducing itself.

From the *Buen Vivir* approach, a (human rights) claim addressing the state can immediately be deduced. Acosta summarises this approach as follows: »*All individuals enjoy the same right to a life in dignity encompassing*

15. Cf. www.oecd.org/progress (last accessed on 24.11.10)

16. Cf. www.beyond-gdp.eu/ (last accessed on 24.11.10) and European Commission (2009).

17. Cf. www.grossnationalhappiness.com. The GNH-Index authors draw on work by Sabine Alkire of the University of Oxford, who also played a crucial role in developing the new Multidimensional Poverty Index of UNDP.

18. Cf. here and on the following Acosta (2009) and (2010).

health, food, shelter, a healthy environment, education, a livelihood, recreation and social security.» (Acosta 2010a: 7)

Simultaneously, the principle of *Buen Vivir* argues for the concept of nature as a legal subject, thus releasing it from the role as a property object.

These ideas are by no means unworldly visions but have already gained political relevance. In 2008, the »Regime of the good life« was adopted as a state goal in Ecuador's new constitution and is mentioned there more than twenty times. In 2009, the principle was anchored in Bolivia's new constitution under the heading »Values and Goals of the State« (Art. 8).

However, day-to-day politics in Ecuador and Bolivia shows that elaborating *Buen Vivir* to a constitutional goal does not yet say anything about its practical implementation. Within the societies, the concept is not uncontroversial. There continues to be a conflict in aims between the guiding notion of a society in solidarity and the legal subjectivity of nature on the one hand and the urge to exploit the countries' mineral resources, especially the oil and gas reserves, on the other.

In order to implement the principle of *Buen Vivir* in practice and make it workable, it would have to be translated into measurable goals and indicators on the basis of which political strategies could be developed. In Ecuador, special indicators are to be developed for this purpose. However, the dilemma is that *Buen Vivir* explicitly rejects the classical linear development concept and that it would therefore be inconsistent to define »development« goals and the corresponding indicators. Given the strong reference the concept makes to its legal foundations, the alternative could be to formulate »human rights« goals. This could also play an exemplary role in developing the MDGs. The MDGs could thus turn into HRGs (*Human Rights Goals*).

5. Outlook

It is not by coincidence that over the last few years, several projects and initiatives have emerged that address alternative development concepts and models of well-being. They are in response to the limits and shortcomings of the predominant development paradigm the

central unit targets of which continue to be combating income poverty and growth in economic production.


The quest for alternative measures and models of social progress is in full swing and is developing dynamically. In its Human Development Report in October 2010, UNDP published a new comprehensive poverty index, the *Multidimensional Poverty Index*, which is to reflect the living situation of people with the aid of a combination of social and economic indicators in a better manner than the indicators of the past have (Alkire/Santos 2010).

In August 2010, UN Secretary-General Ban Ki-moon introduced a new High-Level Panel on Global Sustainability chaired by Finnish President Tarja Halonen and South African President Jacob Zuma that, given the threat of climate change, is to deal with the elements of a new development paradigm and the institutional and financial conclusions to be drawn from it.¹⁹ The Panel is to submit its report by the end of 2011 so that it can influence the results of the 2012 UN Summit on Sustainable Development in Rio de Janeiro.

The period between the 2010 MDG Summit and the 2012 Sustainability Summit offers the opportunity to continue a shift in perspective that is already underway in the development discourse. This also includes that development is once and for all no longer regarded as a process taking place in the »underdeveloped« regions of the world. For given the necessary transformation process towards an equitable and environmentally sustainable development, virtually all the world's countries are »developing countries«. But this also means that dividing the world into industrialised and developing countries is becoming more and more of an anachronism. Against this background, what will the future be of institutions like the OECD, the classical organisation of the industrialised countries, or the G77, the institution representing the interests of the developing countries?

The shift in perspective that has started in the development dialogue does not mean bidding farewell to internationally agreed development goals such as the MDGs. Experience of the last ten years has shown how important measurable and time-bound commitments on the part of governments are. This is the only way in which,

19. Cf. www.un.org/wcm/content/site/climatechange/pages/gsp (last accessed on 24.11.10).



for example, general duties of states such as those resulting from the international human rights covenants can be translated into measurable and therefore controllable commitments of governments and parliaments.

In the coming years, the challenge will be to define Global Development Goals that are valid for all the world's countries while simultaneously considering the economic, environmental and social situation of the individual countries. The climate negotiations on the reduction targets for greenhouse gases show just how difficult but also indispensable the agreement of such goals is.

Here, it is going to be of key importance to overcome two weaknesses of the existing MDG approach: First, the imbalance between the goals and commitments for the poor and the rich countries has to be overcome. Precise quantitative and timebound targets have to apply to all countries in future, for double standards only weak-

en the credibility of the goals as a whole. And second, blindness of the existing MDGs towards distribution of wealth and income needs to be overcome. To a considerable degree, well-being and social progress depend on the distribution of income, assets as well as, ultimately, the opportunities an individual has in society but also the opportunities societies themselves have to survive and thrive. Poverty and wealth must not be viewed as isolated but interdependent phenomena. This needs to be reflected as a key issue in a future catalogue of global development goals, too.

Finally, with all the debates on development goals and indicators of well-being, the ultimate objective must not be overlooked: The goal of all these efforts has to be to create the political and economic foundations for the realisation of the universal right of all people to a decent life. Global development goals are a means to an end – no more, but also no less than that.



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About the author

Jens Martens is director of the European office of Global Policy Forum in Bonn, Germany.
Contact: europe@globalpolicy.org

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Friedrich-Ebert-Stiftung | Department for Global Policy and Development
Hiroshimastraße 28 | 10785 Berlin | Germany

Responsible:
Hubert René Schillinger, Coordinator, Dialogue on Globalization

Tel.: ++49-30-269-35-7415 | Fax: ++49-30-269-35-9246
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