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**EQUITY, EQUALITY AND
APPROPRIATE DISTRIBUTION**
Multiple interpretations and Zimbabwean usages

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1. Introduction

Planners often talk of equity; for example, many regional planners define the purpose of regional planning as being to establish spatial equity or, more crudely, to reduce inter-regional differentials. [1] Yet many of us give little direct attention to the concept(s) of "equity". In this paper I introduce some of the interpretations or types of equity, with illustrations largely from Zimbabwe. The aim is to be relevant and accessible to planners of all varieties, but a few remarks are especially oriented to regional planners.

Regional planners' focus on equity in their definitions of purpose may sometimes be because they take these from textbooks written in Western Europe or America. In those countries regional planning has been a supplement to the main strategies for production, welfare and other objectives; and so it often has mainly looked at reducing inter-regional differentials. This feature is not adequate though as a general definition. Regional planning has intra-regional and national purposes, as well as inter-regional ones. Planning's other objectives - such as increasing production, security or welfare - could sometimes conflict with equality or equity goals.

If the range of objectives of regional planning can be casually specified, it is not surprising if the terms "equality" and "equity" are themselves not always used carefully.

"...our development is concerned with the distribution of the benefits of development. In other words, the degree of inequality (which encompasses inequality between individuals or social groups and inequality between areas) is regarded as an important criterion for measuring development and the reduction of inequalities is considered to be one of the most important goals of development. This concern with equity is well expressed in [the phrase] Growth with Equity" (Chikowore [Zimbabwe's Minister of Local Government, Rural & Urban Development], 1988a:3; emphases added).

But more equity need not imply more equality. For example some individuals or regions might be thought to have earned more or need more. There can be other aspects of the distribution of benefits which concern us besides just the degree of inequality. Even when "equity" instead of equality is spoken of as the objective, the term is often used loosely, with shifts between different and potentially conflicting meanings.

The inequalities in wealth and income in Zimbabwe are indeed very great, in several overlapping dimensions: (a) between whites and blacks, and (b) between the areas respectively allocated to them under the white settler regime; (c) between professionals, manual workers and peasants; (d) urban-rural; (e) intra-rural, between those with good land, cattle, and non-agricultural incomes, and the rest; and (f), in the 1980s, between those with privileged access to other scarce resources (like new cars, foreign currency and travel) and the remainder of the population. There is considerable reference to "equity" in public discussion of these issues, but it is generally unsystematic and casual.

Section 2 presents a number of concepts of equity. It illustrates their relevance to planners' concerns by matching them to the criteria in Zimbabwe for selecting people for resettlement, and by looking at rules for access

to grazing and at the issue of positive discrimination.

Section 3 provides a fuller, theory-based, list of concepts, which helps us to be more precise on differences and similarities between the criteria.

Section 4 then studies a series of public statements by leaders in Zimbabwe, on debt and rights to land, to show how these various criteria of equity and appropriate distribution are locally employed. So we can not only match them to local cases, we find them explicitly used, including more than one at a time by the same person. The mutual relations and conflicts of the principles therefore deserve our attention.

Section 5 introduces some possible explanations for the presence of multiple criteria, such as socio-political conflicts or plurality, opportunism, or the insufficiency of any one criterion or approach; and it also notes some arguments as to how the criteria could be combined. Section 6 concludes with suggestions for further reading.

2. Differing interpretations or aspects of equity: a first look

2.1. Blanchard's inventory

A good starting point is the list by Blanchard (1986) of different norms or criteria of equity, interpreted as fairness.

- A. Equality
- B. Need
- C. Effort expended
- D. Money invested
- E. Results
- F. Ascription
- G. Fair procedure
- (H. Demand & preference)

View A is the simplest interpretation. Equity is seen as meaning equality; inequality is seen as inequitable. We need to ask: why? (and Section 5 below will look at some responses); and also equality of what? - for one can talk about the distribution of many different types of valuable. [2] In this paper we refer broadly to equality in receipt of benefits.

View B holds that fairness implies distribution to whomever is most in need, not simply to whomever is present. In Zimbabwe, the criterion of basic needs underlay an ambitious proclamation by Minister Karimanzira (1986:2): "Our public service must have, as their guiding star, the complete eradication of ignorance, poverty, hunger and disease from the face of Zimbabwe in the foreseeable future". Needs are not equal: for example the old and the sick need more. A classic socialist ideal of distributive justice is "to each according to his needs", at any rate for the stage of "full communism". This is often paired with the contributive principle of "from each according to his abilities". [3]

The third and fourth views (C, D) concern not one's current state but instead what one has done: how much one has contributed in terms of money or effort (which can be measured by quantity or quality); in other words "to each according to his contribution". The conventional Marxist ideal during earlier stages of socialism is "to each according to his work". Using this

criterion, President Mugabe has warned workers of "Lenin's saying: 'Those who don't work neither shall they eat'" (Mugabe, 1987:10).

The fifth view (E) concerns not what one has done but what one will do; it considers it fair that resources go to people who will (we expect) make best use of them and produce the best results. Some people feel that this criterion takes us beyond the scope of "equity"; however the term "fairness" may cover it - we may feel it fair to give land to those people who will not degrade it.

Blanchard's sixth type of norm (F) returns to who one is, but now with restrictions concerning who has the right to benefit: on grounds of ascriptive status, e.g. sex, age, caste, race or nationality. These are grounds which an individual can do nothing about, at least in the short run. For example a town council may consider it fair to only allocate housing to people who are already registered as residents of the town, even if other people need housing more or would maintain it better.

The seventh type of norm (G) holds that an allocation is fair if it is produced by procedures that are accepted as fair. Some of the possible procedures here are an unbiased lottery, inheritance, or a first-come-first-served rule.

Lastly, but now perhaps going beyond the bounds of equity or fairness, there is the norm that distribution should be to the people who show that they most want the good (H). We must beware that if wants are measured by the money that people are willing to pay, then the wants of the rich will receive greater weight.

When we use this list we find that, as with any set of concepts, we need some practice to become familiar with them, and that different norms sometimes overlap or are hard to distinguish; yet we do find that we can now think more exactly about equity. Before going on to analyse and refine the list, we can illustrate its relevance by taking two cases in Zimbabwe - selection for resettlement and access to grazing lands - and the issue of positive discrimination. [4]

2.2. An application to the regulation of grazing in Zimbabwe

How should access to the present communally-held grazing lands be distributed, remembering both the very unequal ownership of cattle and the dangers of overgrazing? Reynolds (1987) tried out different possibilities on a group of farmers.

- a) "We had a fascinating discussion with five large farmers... they could not carry the community with them [on grazing management], it was each man for himself... We asked if they thought it unfair that they enjoyed their birthright while others could not. This caused some hesitation. It was an unfair question one responded. They had the right to graze, the others simply had no cattle. It was not their doing."

These farmers' response fits Norm G: open-access grazing is thought to be a fair procedure, so its outcomes are deemed fair, even if they are very unequal. This view seems to be accepted too by many of those who have no cattle; they dream of a time when they will have animals to share the

grazing.

- b) "All right, we agreed, but if you accept that there is a need to set a carrying capacity, how would you allocate the rights to graze. They...had no answer..... [They] were suspicious of [each adult having equal grazing rights]...because most of the rights could not be exercised [since most people have few or no cattle].."

The farmers were not happy with allocation of an equal amount of grazing land to each community member; in other words they reject the simplest variant of Norm A, the norm of equality.

- c) "What if people could exchange their rights for a price fixed locally, say \$10 per livestock unit...? [Most] were not happy. Why pay to others, why increase the cost of running cattle?"

The proposal here was to supplement norm A, namely equal rights, with Norm H, allocation according to demand. The aim was to overcome the objection that many rights could not be exercised; and the method suggested was to allow those who cannot or do not wish to exercise their rights to instead rent them to others who would like extra rights. But this would leave the large cattle-holders directly worse-off than under the system of open access. What might induce them to accept such a monetary cost?

- d) "What if the community agreed to tax themselves, say 50 per cent of the going price of a grazing unit would go into a fund to improve the grazing[?] The rich would be compensating those who could not exercise their grazing rights and providing the cash upon which the poor would pay the same...tax."

This final proposal adds norm E, i.e. a concern with effective use, to norms A & H which had already entered the discussion.

"Suddenly there was interest from all five farmers. They saw management, efficiency, investment and equity as possible." [5]

(All quotes in this section were from Reynolds, 1987:22-3).

2.3. An application to selection for resettlement in Zimbabwe

The original criteria used for resettlement were broadly these:

1. Age: adults not more than 50/55 years
2. Citizenship: Zimbabwean
3. Family status: head of household, with dependants
4. Health: good
5. Income: low
6. Landholding: little or none
7. Agreement to not have any formal sector employment; and to not hold land outside the resettlement area
8. First-come-first-served/queueing principle.

Criteria 1 to 4 might be seen as ascriptive (Blanchard's norm F). They are used in an initial screening-out of some applicants, to make the selection process more manageable; not all criteria need to be applied to everyone. Each ascriptive criterion is a rough-and-ready indicator of a more substantive criterion. It is usually considered fair for example that the

Zimbabwean government discriminates in favour of its own citizens in such cases: because citizens are members of a group that operates under shared procedures for contributions, opportunities and receipts; and they are presumed more likely to have made relevant contributions in the past. The criteria of age and health, and perhaps of family status, could be proxies for ability to use the land well and produce desired results (i.e. Blanchard's norm E).

In all cases the proxies are not very accurate indicators; but they are easy to apply and hence good for screening. The screening is not very restrictive, with one exception: the exclusion of women applicants who have husbands working elsewhere. The absentee husband is presumed to be the head of household, and is excluded by criterion 7, the prohibition of outside employment.

The more restrictive, and hence major, criteria used have been 5, 6 and 7, which like number 3 are criteria of need (norm B). Criterion 6 - having no or insufficient land - initially also covered many who had been displaced to "protected villages" or went to other countries during the war. Criterion 7 - forbidding other employment - might be a proxy for concern with production results, if one believes that this requires full-time farmers. There is much evidence however that farming success is related to having outside sources of income. Criterion 8 - the queueing principle - comes into play if screening still leaves many more candidates than there are current resettlement places. (As of 1989 about 130,000 families had requested resettlement, and 50,000 had been settled.)

So, need was the main criterion, subject to some ascriptive conditions; plus, of course, the criterion of willingness to move, which fits Blanchard's demand norm (H). The criterion of equality does not figure directly, but its implications may correlate fairly well in this case with those of the principle of need; in addition, the settlers are in principle given resources of equal potential. Actual selection has not always matched the official criteria (Mugabe, 1990); and there are criticisms of the focus on selecting families rather than whole communities. But those are matters for another discussion. [6]

Besides the original official criteria, other criteria came forward in public discussion, notably these:-

9. Ability to use the land well
10. Service record in the liberation war
11. Historical claims of people in a particular area
12. Strength of desire to settle the land.

The criterion of ability to use the land well was advanced by the representatives of Purchase Area (i.e. small-scale commercial) farmers and Master Farmers (i.e. those with a formal qualification), and by many MPs. There are fears that extension of average Communal Area farming into resettlement areas is bringing misuse and degradation, which is unfair to future generations. "One only needs to visit some of the resettlement schemes that were established after independence to appreciate the extent of the damage and degradation of the land by some of the resettled peasants" ("The Herald" [Harare], editorial; 29 July 1989). Criterion E is being used here: a concern with future results. An ascriptive criterion enters if we take the holding of a Master Farmer certificate to be a proxy for farming ability.

The Zimbabwe government gradually moved towards emphasizing this criterion, of ability or qualifications. From around 1983, criterion 6 (having little or no land) declined, from being almost a necessary and sufficient condition, to being just one consideration; and master farmers were no longer excluded from resettlement. By 1988, when speaking of "remapping" the resettlement programme, Minister Chikowore said: "Rural district councils should identify the potential individual settlers on the degree of individual family need, then select, giving preference to those with either a proven track record in farming, or keenness and potential ability" (1988b:5; emphases added). Since many are needy, the key consideration becomes productivity.

A further twist was added by Minister Chitepo: "The Government will not consider for resettlement those communal farmers who have intentionally neglected or misused their natural resources in order to be resettled in better land"! (1988:2). The criterion of future results is now subject to a condition: some peasants are blamed for misuse and are to be excluded, considered deficient in terms of the quantity or quality of effort they have expended.

Rather than looking to future results or present needs, some criteria refer to the past: either the immediate past of the liberation war, or back to earlier generations and the question of which community was displaced by the settlers from a particular piece of land. Looking at war records fits criterion C (effort expended). It does not seem to have been used much for resettlement to family farms. Even for collective farms, war service was more important in affecting initial willingness to apply than in influencing whether or not one was selected, for collectives have been seriously under-subscribed in total.

The criterion of historical claim to a particular piece of land is used by many rural people, and is based on Norm G (fair procedure). The claim is that the land was previously rightfully inherited and held by a particular local community, then unrightfully seized from them, and should rightfully now be returned. This is rejected by the government, for the local people may not be those most in need; and the government is seeking to impose national-level norms over local norms. In addition, referring to past occupation would open up many questions: what if the previous owners had themselves displaced another group by force? and do claims from the past have to be discounted in weight according to how long ago they refer to?

The final criterion in our list matches Norm H (demand): the intensity of desire to settle the land, as shown by actually taking possession of it, i.e. by "squatting". This is a present-oriented criterion, like need. Strong demand might also be a good proxy for future results.

In principle, government has always rejected squatting. Squatters are not necessarily those most in need or best able to use the land. Greatest pressure on land is found in Masvingo province, whereas vacated farms were most common in the provinces of Manicaland and Mashonaland East, where the war was fiercest. Further, some "squatters" were not poor and landless, but instead those with the urge, resources and skills to expand; for example, those with cattle that sought extra grazing and could provide draught power. This would be a positive qualification in terms of a results criterion; but not in terms of the needs norm (at any rate if we consider needs of people

more than needs of cattle).

In practice, many squatters have managed to acquire land; e.g. by being accepted as settlers in the Accelerated Resettlement Programme of the early 1980s (Gasper, 1990a). Some political leaders, as opposed to civil servants, supported squatters; and, reflecting the historical background, it was not politically acceptable to remove all or most of the squatters, especially after they had begun to invest and hence qualify in terms of effort expended and money invested (criteria C & D). But after endorsing many of the initial squatters, government wished to control any further land allocation. The Minister of Rural Development declared "total war on squatters", saying they "were a menace and wanted to destroy and plunder the country's resources" (Chikowore, 1987).

By 1990 the criterion of expected future results had become dominant. In announcing a revised land reform policy, the new Minister of Agriculture declared that: "Land will not be given to anyone who wants it. We made mistakes in the past by giving land to people who, in turn, leased it to others, who were only interested in cutting down trees for firewood.. We will give land...only to those who have proven knowledge and ability of how to use the land. ..those who have the desire, commitment, knowledge, ability and wish to use the land" (Mangwende, 1990).

Overall, we find a rough but interesting pattern. The Zimbabwean government originally gave priority to the present-oriented criterion of needs; and in practice gave some weight too to manifest demand. It has not given priority to past-oriented criteria; and instead has increasingly stressed future-oriented criteria of ability to use the land. How these official criteria will be interpreted in practice of course remains to be seen.

2.4. Positive discrimination?

These various pulls of past, present and future are one key theme in disputes about what is fair.

Consider the arguments that rage in Ghana and elsewhere over whether to offer special inducements to expatriate professionals to return and contribute to the country's recovery. As of the late 1980s, around half of Ghana's graduate manpower was abroad. It cannot be expected to give up what it enjoys there unless compensated in some way. The inducements might be an effective investment in terms of future return on resources. Yet the people who would directly benefit would be those Ghanaians who, it could be argued, firstly deserve less because they showed less loyalty in the past, and secondly, need less reward in the present because they are already better off (and have been so for many years) than their compatriots who stayed at home. Most of those who stayed back are strongly opposed to offering inducements, even if foreign aid were available to pay for them.

In the Ghana case people are debating positive discrimination for those who are already advantaged. Usually positive discrimination is at least supposed to be for those who are less advantaged. Amongst the arguments put forward as to why African-Americans should be subject to lower college admission standards, we can again distinguish arguments that refer to past, present and future.

In terms of the present (or, strictly, the near-future): "the Faculty Senate at Berkeley has argued that certain ethnic backgrounds should themselves be taken as qualifications for admissions, since such diversity encourages 'a more dynamic intellectual environment and a richer undergraduate performance'" (Hacker, 1989:63). This can also be an argument for group quotas. A more truly present-oriented argument is that certain ethnic groups are on average poorer and more needy; however, in practice, positive discrimination policies rarely apply those criteria to individual admissions, and instead can disproportionately benefit people from middle-class families.

Next, in terms of the past: "A further argument is that blacks, in particular, are entitled to special consideration, in order to compensate for having been held back by enslavement and discrimination [in both previous and current generations. Similarly] veterans, who lost time serving their country, have points added to their civil service scores" (ibid.). One version here of the compensation argument is that Afro-Americans have been held back, and would have done better in their school education if not for previous discrimination. Another version is that people need to be compensated in some way or other for past discrimination as a whole, and that education happens to be the area where they wish to receive support.

"A third view takes a practical turn, arguing that for its own well-being the nation needs blacks in a wider range of positions" (ibid.). The concern in this argument is with future results. In contrast to the Ghana case, past, present and future considerations may point in the same direction.

Similar types of argument can apply to former freedom fighters in Zimbabwe. Firstly that they unfairly lacked past opportunities, because they were away due to the fighting. This is an argument for positive discrimination, and fits the criterion of fair procedures, under the special case of compensating for unfairness. The second argument is that former fighters deserve to be rewarded for their actual fighting. Rewards could include money or special opportunities (i.e. reverse discrimination), but not the grant of educational qualifications.

3. A fuller analysis of concepts

Blanchard has given us a set of criteria culled from the literature. Apart from now distinguishing them in the views we encounter, how can we analyse and assess them? Being able to group distributive criteria as past-, present-, or future-oriented is one helpful step. This section extends the analysis, and provides further tools for grouping and understanding criteria. (Some readers may prefer to first read the further examples in section 4.)

We will follow the line of argument provided by Sen (1984), with a few additions and modifications. Sen analyses ten important types of criteria of distribution.

Perhaps the most influential modern criterion of appropriate distribution is utilitarianism. It holds that policy should aim to maximize the sum of all individuals' utilities. (The meaning of "utility" often remains conveniently ambiguous, as either satisfaction or preference-fulfilment;

these two need not be the same. The latter matches Blanchard's norm H.) This doctrine consists of three logically separable elements:-

(a) Consequentialism: one should assess options and actions by their consequences/effects/results; i.e. we should look to the future rather than the past. This looks similar to Blanchard's norm E, that one should look at results; but note that it covers immediate results as well as those in the longer term, and it concerns any type of result, e.g. need-fulfilment. [7]

(b) Utility-base: the results that one should consider are utility effects; all relevant results can be measured in terms of a common currency/denominator, namely utility.

(c) Sum-ranking: one should rank options and actions by the (net) sum-total of valued effects they produce in society.

Utilitarianism has been a major strand in ethics, in policy economics (notably in cost-benefit analysis; MacIntyre, 1977) and in urban-&-regional planning (Allison, 1971; Eversley, 1973; Thomas, 1982; Sillince, 1986). Its prominence reflects its relative clarity and broad scope. All this make it a good starting point in discussion. Objections can be raised to each of its elements; and we can then see how other criteria of distribution reject some or all of them. The summary table below broadly indicates areas of agreement and disagreement.

(Detailed reference to the table is best done in the course of reading the rest of this section. Some entries are placed in brackets or left blank where a theory might in principle adopt either of the options or if they are not applicable. The letters after most theories indicate the criteria that most closely correspond in Blanchard's list.)

TABLE: SOME NORMS OF APPROPRIATE DISTRIBUTION

	<u>Conseqm.</u>	<u>Utility-base</u>	<u>Sum-ranking</u>
1. Utilitarianism [E]	Yes	Yes	Yes
2. Pareto principle	Yes	Yes	No
3. Relational principles [A]	Yes	Yes/No	No
4. Rawls	Yes	No	No
5. Needs [B]	Yes	No	Yes/No
6. Other results [E]	Yes	No	Yes(/No)
7. Constraints set by rights		No	No
8. Deserts: labour rights [C]	No	No	(No)
9. Historical rights [D, G]	No	No	(No)
10. Agent-specific duties [F]	Yes/No	(No)	(No)

Sum-ranking implies that there is no direct concern with distribution. Utilitarianism has only a possible indirect concern, for example if one believes that moving to a more equal distribution will transfer goods from people who obtain low marginal utility from them, to people who will have higher marginal utility. But if unequal distribution leads to greater total utility then it is to be supported. For example, utilitarianism is in principle willing to sacrifice individuals for the greater good:- at the extreme, a man might be "cannibalized" for the spare parts needed to save

many others or a great man; a human guinea-pig may be subjected, without being asked, to tests that could yield important knowledge; conscripts can be sent to their death in war; and one generation can be sacrificed for the greater benefit of future generations. If it is clear that a particular sacrifice does not increase total utility, perhaps due to various indirect negative effects, then utilitarians will not advocate it; but they are ready to consider sacrificing individuals.

Many theories reject sum-ranking. The most minimal departure from utilitarianism is the Pareto criterion in economics (#2 in the table), which avoids summing the utility gains and losses of different people. All it can therefore say is, first, that a move in which at least one person gains and no one loses is an improvement, and second, a corresponding claim about retrogressions. But in real policy moves there are virtually always some people who lose while others gain.

There are other more helpful criteria that reject sum-ranking. One set are relational or comparative principles (#3), so called because they give independent weight to some aspect(s) of the pattern of inter-personal distribution. The simplest example is the equality principle: equal results are best. Another example is the maximin principle: that we should choose the option which does best for the person (or group) at the bottom. This principle supports inequality as long as it means the poorest do better than they otherwise would.

The maximin principle is popularly associated with the philosopher John Rawls. It actually only figures in one part of his proposed principles of justice; and his theory (#4) further differs from utilitarianism in its "currency" for comparisons. Rawls is concerned with the distribution of "primary goods", including rights, liberties and opportunities, and the requirements for self-respect, not just with utilities. Sen extends this concern, to emphasize the actualization of certain basic human capabilities or potentials, and to avoid a bias against people for whom this actualization is more costly (e.g. those who are less talented, or who need more; Sen, 1984). Both authors reject the utility-base assumption.

Principles of need (#5; the same as Blanchard's norm B) similarly reject a utility denominator. They argue that some people have greater needs than others and should receive more resources, regardless of whether this produces more utility than the alternative uses. For example, we would expect that young people are more effective utility-generators than are old people. Principles of utility could direct resources more towards the young, principles of need more towards the old. Needs are different from wants; one can say that children need education, or that populations at risk need inoculation, even if they don't want it. Discussions of equity in health (like the recent special issue with that title, in "Journal of Social Development in Africa", 1990; vol.5, no.1) are preoccupied with need fulfilment, and equality of access.

Next, there are positions (#6 in the table) that are also still concerned with maximizing attainment of approved outcomes (i.e. are consequentialist), but which do not take utility or need-fulfilment as their objectives. Many other results are advocated: for example, to increase knowledge or beauty or freedom or participation or national greatness or prestige - for their own sake, not because they advance utility or another objective. Mixed positions are of course possible. Values like freedom or democracy can

also appear as setting constraints on the pursuit of other objectives (#7). Rights based on considerations like freedom here set limits (absolute or non-absolute) on what can be done to achieve other goods.

Positions 8 and 9 concern asserted rights that are important enough to consider separately, not just as constraints but as independent claims to benefits. Both positions reject consequentialism and look to the past. Position 8 covers claims that people deserve something because of their previous contributions; hence the word "deserts". Contributions could be judged in terms of effort or money (i.e. Blanchard's norms C and D), or skill and effectiveness, or loyalty and commitment, and so on. Where people are considered as deserving of something just because of what they are - e.g. male or white or a holder of a Party card - we come instead to Blanchard's ascriptive heading.

In Position 9 people are entitled to things that they obtained in the past through fair procedures, regardless of whether or not they deserve or have earned them. They may simply have been lucky, or have inherited goods from people (usually their own family) who were in turn entitled to them. In this position it is held that a person has a right to give her goods to whomsoever she chooses. This fits Blanchard's norm G of fair procedure. Sen's presentation emphasises the historical dimension, for the entitlements are held to derive from fair past transactions. [8]

Position 10 holds that one has a duty to give priority to certain other people to whom one is responsible, even if those are not the people most in need or most deserving or best able to benefit. The duty could stem from a general relationship, e.g. to one's children or parents or fellow-nationals, or from a specific commitment, e.g. if one has made a promise. Some people claim that if one lacks a strong commitment to one's family then one is unlikely to be committed to anything outside oneself. However this position is a further step away from the universalism seen in utilitarianism or needs-theories.

Former President Banana said that "the ethics of collectivism and the African system of the extended family remain the only positive and redemptive force" in the modern world (1987a:12), recognizing the altruism in both. But the two are not the same and can conflict. The extended family has an ascriptive/agent-specific morality that preferentially includes family members and not others; whereas collectivism is meant to treat everybody on the same basis.

The list which we have drawn from Sen is more complex than Blanchard's. One reason is that it has a more logical structure and so helps us to see more possibilities. In addition it looks not just at equity or fairness, but also at other criteria for appropriate distribution. There is no consensus on the exact scope of these terms; people hold differing theories of what equity and social justice mean. And people generally want to gain the legitimacy that goes with the terms, by putting forward definitions that match their own interests.

One does not have to look hard to find these principles in public use, as we will now see in Section 4 on the debt crisis and land reform in Zimbabwe. The difficulty on the contrary seems to be that we find so many of them in simultaneous use, but without an overall framework. Section 5 considers possible responses.

4. National lands and international debts - illustrations from public discussion in Zimbabwe and elsewhere

4.1. Debt and remittances

President Banana suggested that: "The elimination of private ownership of the means of production leaves no room for unearned income" (1987b:6). But what do we see as earned? The question arises when we address cases such as paying rent for a house that another person has saved for, interest on savings or loans, profits on risk-capital, or the burning issue of international debt and remittances.

The Cuban ambassador to Tanzania has said of Third World debt that: "The debt is simply immoral and cannot be repaid. It cannot be repaid because the people of the Third World have paid it already" ("The Herald", 8 May 1987.) In speaking of debt he is referring to loans. His argument can be read in various ways: first, that the Third World has paid enough during colonialism and neo-colonialism; second, that it has paid enough on the current loans but was swamped by 1980s rises in interest rates; and relatedly, that the procedures it has become involved in are not fair, in respect of both the operation of financial markets and the other markets and forces which together lead countries to accept loans.

Note that the argument here is not that the poor cannot be required to repay because they are poor (i.e. on grounds of need or equality) or because they would enjoy the resources more than the creditors would. Instead the argument is past-oriented, rather than present- or future-oriented.

However in the case of Zimbabwe it is held that:

"We incur debts because of the inadequacy of our own resources to sustain our development programmes. The result is that when the foreign exchange cake is presented, we, naturally, and in all fairness, feel bound to invite our creditors to join us in partaking of the cake." (Mugabe, Independence Day address 1987:7; emphases added.)

This fits a procedural norm (#9 in the table) of accepting duties that one has incurred under procedures that one accepted. Repayment is made not simply on grounds of prudence (future-orientation) but because one has obligations from the past. [9]

A more prudential case is put in another Ministerial statement; though this concerns remittance abroad of profits on investments.

"..profit and dividend remittances...[are] now 'blossoming to full magnitude', reaching something in the region of Z\$100 million a year. Although this could create tensions within the country among those that think 'charity begins at home' [DG: which is an example of norm #10, of giving priority to certain groups to whom one is responsible], this was 'the price we must pay for investment which came into this country - and also for our good name'" (Chidzero, 1987.)

The Minister may want to maintain the country's good name for its own sake; this would fit norm 6 in the table, "other objectives". But more likely it is for the sake of obtaining further investment or loans, and fits the utilitarian norm #1, future welfare. When he talks of investment having its price, this is Blanchard's norm D of return to money invested. Also, if the right to remit profits was a previously accepted condition for receiving the

investment, the comment fits the procedural norm #9 of historically inherited rights, with priority going to abroad due to past agreements.

In reality, profit remittance is not given overriding priority, and was cut back by the government to safeguard various domestic interests and commitments; but nor was it put last and eliminated.

While the issues here concern international payments, the same principles arise in discussions of domestic debt repayment, for example for agricultural credit or house purchase loans.

4.2. Land, returns, and the fruits of effort

In discussions of the land question, there are again references to prudence and returns, agreements and procedures; but now the criteria of equality, needs, rights and deserts are very often highlighted. For:

"These God-made or nature-made phenomena are ours together.. I find my views on this subject in very interesting coincidence with those of Mwalimu Julius Nyerere who says... 'land is simply God's gift to his living creation. There is no human effort involved....'" [DG: This is the pure equality criterion and its context for application. Nyerere seems to apply it to all living creation, not only humankind.]

"Nyerere then proceeds to state that whenever a man 'uses his intellect, his health and his ability to make anything, that thing becomes his property'.... Indeed when an individual expends his own labour and energy in exploiting any natural resource at his disposal, provided others are also entitled alongside him to similar exploitation of that resource, then the product of his labour must morally be his, and he is fully entitled to use such product to his own benefit or in any other manner of his choice. On the basis of this moral reckoning... workers are certainly entitled to the fruits of their labour." (Mugabe, 1984; emphases added).

This is the criterion of returns to effort. The property rights which it is held to establish here - subject to a proviso of equal opportunity for others (including both those now and later?) - include full entitlement to use as the owner sees fit.

However Comrade Mugabe also recognizes the need for taxation; and went on to stress that: "socialism subordinates the interests of the individual to the common or general interests of society". This is a more utilitarian sentiment. One implication could be that he considers that the proviso of equal opportunity is typically not fulfilled or fulfillable.

One can add several other limitations of the claim to full entitlement to "the fruits of one's labour". In particular, when we are not talking of Robinson Crusoe but of a complex social division of labour, where each contribution can be vital, the social product is not entirely objectively divisible between the various inputs according to "their" contributions.

The settlers in Rhodesia claimed that they had brought into use natural resources that were in surplus. But they seized the best land, which by definition is scarce; they explicitly removed others' legal entitlement to

use that land, and coerced their labour in order to develop it; and in time all land became scarce. The settlers clearly did not satisfy Nyerere's proviso (which was earlier stated by the 17th-century liberal philosopher John Locke).

Settlers may instead try to defend their acquisition on procedural, utilitarian, or deserts grounds. The procedural claim - that the Rudd Concession in the 1880s was a binding agreement with the responsible authority, which transferred land ownership rights - is spurious (e.g. Riddell, 1987). Even if it were not, many people would dispute that any authority had the right to transfer a people's birthright. A complication is that in very few cases is the land now held by the descendants of the original settlers. Most present owners bought their farms (Gukurahundi, "Financial Gazette", 22 February 1991).

The Government upholds "the [procedural] right to acquire, hold and dispose of property"; but it feels it must balance this against other claims: "it could not, with a decent conscience, allow...the rich landowners to hold government to ransom at the expense of the landless" (Minister Mnangagwa; "Financial Gazette", 14 December 1990). One reason offered is the appeal to older rights, in the current dispute on whether courts should be allowed to decide on compensation for land acquired for resettlement. Questioned by a Belgian correspondent, President Mugabe declared: "I cannot be dragged into court, I, Robert Gabriel Mugabe, with ancestral roots that go back generations and generations, by a settler who only came here 90 years ago" (ZIANA, 7 February 1991).

The utilitarian claim, that settler colonization led to far greater development than would have happened otherwise, can only satisfy utilitarians, even insofar as it were true, and then only for a limited period: for by the time of the liberation war it was clear that the presence of a settler regime was slowing development. After 1980 the utilitarian defences of commercial farms have been pushed back, as peasant farming has blossomed; but they could remain valid in some cases, including for certain export products, notably the biggest of all, Virginia tobacco.

One also encounters a defence on deserts grounds: not of the original settler acquisition but of the current property rights in law, or at least of a right to compensation. This is the argument that the main value of the land is not inherent but has been produced by investments, and that the rights to these and their products are vested in the current owner. The investments were made though with labour whose cheapness reflected the settler's policy regime.

Tangwena (1989) takes a different non-utilitarian line, that could fit the egalitarian norms 3 to 5 in our table, such as equality and needs, as well as norm 6, for he espouses socialism as another objective in its own right. He accepts that "disturbing the existing property relations in favour of the people will have some short-term costs"; but argues: "Socialism demands it.. [and] an acceptable and fair distribution of land". But he is not explicit on how he interprets "fair" or who should get the land.

5. Assessing the different interpretations

What are we to make of this wide range of criteria seen in policy discussion? To go further in trying to assess or rank the criteria one would have to seriously explore parts of social and political philosophy. Section 6 suggests further readings.

In this section I will mainly ask instead why it is that we find so many criteria in use. Is it partly due to lack of sophistication, so that different and conflicting criteria are used without awareness of their difference and conflicts? Is it sometimes a product of opportunism, or a normal feature of general ideologies? Or is it a symptom of social transition, and the coexistence of various forms of social organization, that will fall away in a rationalized homogenized future? Finally, is it instead a reflection of inevitable pluralism in our life and concerns, and of the limits of any one set of concepts? I will present each of these possibilities and suggest there is some truth in each. As to how far they apply in particular cases, it is left for the reader to judge.

5.1. A second look at needs and deserts

According to Minister Ushewokunze, socialist groups in Zimbabwe's ruling party are united by a recognition "that society must be re-organised in such a way that it is the people's needs that are paramount" (1985:vii). In contrast other groups "joined the struggle because business [and job] opportunities had been closed to them by a racist government" (loc.cit.), and were mainly concerned with rights of equal opportunity and of equal return for equal work. In other words it may be that different criteria largely correspond to different political and social groups, especially during a period of transition.

Dr. Ushewokunze wrote as if there are only two broad groups, each united on its main criteria and having only one or two. But for example, some of those who speak of needs criteria are more prescriptive than others, in telling people what the people's needs are; nor is there always agreement on what to tell, nor on whether in an era of transition the leaders need to practice what they preach, or should instead strengthen (and perhaps enrich) themselves as long as the perceived enemy is strong. [10]

The needs criterion was also extolled by former President Banana: "...man's right, indisputable right to means to life... '..to each one according to his need'... One cannot think of a better order for the Zimbabweans..." (1987b:6). On another occasion, asked about his purchase of a large house in the "low-density" suburb of Mount Pleasant, Cde. Banana added the criterion of desert: "I try to save, but each time you get money, say, you go to the beerhall. After ten or twenty years I have saved reasonably enough for a house, then you come and say, 'You are a capitalist!...' [Not] everybody who is poor has been exploited. They might have exploited themselves" (1988:5). [11] Similarly, President Mugabe is reported as saying: "it was expected in life that everybody wished to be wealthy. 'But it must be with money we have honestly worked for', he emphasised", adding the criterion of fair procedure to that of work done (Mugabe, 1989). The argument in these cases is that life requires reference to more than the criterion of need.

5.2. Use and limits of philosophical analysis; and the status of equality as an independent value

The earlier sections suggested that lack of sophistication is fairly common. It is worth taking another illustration of both the scarcity and value of conceptual clarification, as it concerns the central issue of the status of equality (in benefits) as an objective, and its differences from equity or social justice.

Greater equality of income could conceivably increase total utility or need-fulfilment, for example by direct or indirect effects on health, skills, peace and so on. It might similarly be conducive to some other desired objectives, like participation. But are there any reasons to value equality in its own right, not just as a possible means toward other objectives? Many people fail to face this issue and thus to clarify their stand on the significance of equality.

Having posed the question, it is not easy to answer. For some of the writers who face it, the answer appears to be no. Engels held that: "any demand for equality that goes beyond [the abolition of classes] necessarily passes into absurdity" ('Anti-Duhring'). One can however find in the literature two lines of positive response (Miller, 1982). The first claim is that equality of material conditions could be so intimately connected with certain objectives, such as dignity or equality of opportunity, as to be viewed as an objective in itself. But equality of conditions is, strictly speaking, here still a means to other ends.

The second response is that equality should be the starting point in discussions on distribution, as an acknowledgement of the dignity and humanity of each person. In the absence of reliable information establishing why people should be treated differently - due to different needs, deserts, rights, skills or whatever - the presumption is that they should be treated equally. And the information is indeed often unreliable or unclear, partly because it is supplied by those with vested interests in the decisions that are to be made. So our presumption in favour of equality survives as more than just a starting point. Inequality is then not necessarily inequitable, but any inequality has to be specifically justified, whereas equality does not.

Having made a definite but modulated case for equality in its own right, one can consider what relative weight this objective might carry. It will not be an overriding weight. Only by tacitly presuming that egalitarians must put overriding weight on equality, could Lal (1976) make allegations such as that egalitarians must support the Khmer Rouge in Kampuchea, who found the quickest way to equality:- killing the educated (Gasper, 1986).

Since there are many plausible distributive criteria, we need to balance or choose between them when making policy choices. (For example even if we consider it just for people to inherit goods, the results, and the basis for future interaction, might be seen as unfair, so that we consider it appropriate to partly override or limit those just rights - by inheritance taxes - for the sake of a greater social good.)

We could try to do this balancing or choice intuitively, or in terms of a unifying general theory which derives the different criteria as special cases of deeper principles and/or shows how they fit different social

settings. Philosophical analysis is important because intuitive balancing of the criteria can become muddled, and is certainly done differently by different people.

Certain theories try to derive all or most of the other commonly seen criteria, by deduction from a single set of principles; for example, utilitarianism, some theories of human needs, and Rawls' theory all attempt to do this. Thus utilitarians often try to rationalize other norms as being special cases or working approximations of their theory, by presenting them as feasible practical guides to utility maximization in specific situations.

One of the limits to this sort of argument is that the information we can obtain on any one of the criteria - needs or deserts or utilities or whatever - is inevitably imperfect; so we may need to use many criteria (Sen, 1984). And, in all the unifying theories, the categories in use, such as utility, need, equality, or contribution, may be inevitably too imprecise or ambiguous to sustain any total claims built upon them.

As one illustration, Rae (1981) analyses internal tensions in the ideal of equality, stemming from the many types or dimensions of equality. He concludes that "to boil things as complex as equality down to two or three headings is inevitably too far from the truth to serve even as a sensible approximation" (1981:144); and that, since there is no single essence of equality, its greatest rival proves to be not order or efficiency or freedom, but instead: itself (p.150). [12]

5.3. Uses of sociological clarification; and the sociology of equality in planning.

A second line for attempted understanding is to try to link the various criteria to particular social contexts. Miller (1976) discusses "Social Justice in Sociological Perspective". He argues, for example, that the criterion of needs is seen more in small-scale relatively egalitarian non-market societies, such as some tribes. The favourable conditions there appear to be that people know each other, often work jointly, and share some notion of the common good. Next, he holds that the criterion of rights in respect of one's position in society (similar to Blanchard's norm of ascriptive status) is fundamental in stable hierarchical non-market societies, for example feudal or caste societies. He holds that the criterion of individual deserts is more fundamental in cases dominated by the market, where people interact as formal equals and typically do not know each other as individuals, nor each other's needs.

In contrast, in late capitalism and state capitalism, individual contributions become much less separable, and one can find a mixture of sanctioned distributive criteria: including a quasi-feudal distribution according to position (perhaps for the bureaucracies or ruling party officials), and an emergent welfarism where one's deserts are seen as linked to how far one helps to fulfil others' needs. Finally he suggests that a purer egalitarianism often emerges in times or contexts of social dislocation, but only temporarily.

There are a number of shortcomings or gaps in Miller's theory; for example, claims of entitlement rights are also very important in market societies, but are based on arguments from liberty and fair procedures rather than only

from deserts (e.g. Nozick, 1974; this was criterion #9 in section 3 above).

Clearly though there is some value in his line of approach. One can perhaps ask what mixtures of - to use his terms - tribal egalitarianism, feudalism, individualism, neo-feudalism, welfarism and so on are at work in various African countries. In Botswana for example, now the richest country in Southern and Eastern Africa (other than the neo-feudal racist Republic of South Africa, with its - at least until 1991 - ascriptive order), there has been no social security system and an individualistic ethic seems to be growing fast. Readers may also care to re-examine the statements from Tanzania and Zimbabwe that we saw in sections 4 and 5, as well as look at current practices.

Here we can ask why different planning disciplines sometimes place differing emphases on equality. Some disciplines evolved distinctive variants for developing countries, with their own large professional literatures, numerous journals and special models. But physical planning in the South remained fairly close to styles from the West, both professionally and intellectually (Gasper, 1990b). This may be reflected in the relative weight it often gives to the criterion of equality of distribution.

Western physical planning traditionally focused on allocation and provision of social infrastructure more than on production. In all countries, equality has the claim that we mentioned, as the most defensible starting point for discussion; it is also sometimes relatively politically safe and administratively clear. And in the case of social infrastructure, where these political and administrative considerations can be very strong (e.g. because it is often hard to specify and quantify the effects of investments), equality is a more strongly established criterion. This is less true when we come to directly productive investments; and in poor countries the claims of production development deserve, in many people's view, relatively high priority compared to equality. Richer countries are more able to afford to sometimes give production's claims lower priority, and/or have the resources to ensure equal provision of facilities. They also have the well informed organized pressure groups to demand equal provision.

We can see that different distributive criteria tend to be found in different settings - for example, possibly varying with income level; but also in any single society there will be a number of criteria with relevant claims. Every state needs to consider both production and distribution, growth and social services. Every society inevitably includes a number of overlapping social contexts, with a number of modes of production and allocation, from the family through informal associations to many types of formal organization. Even within a single mode, various considerations are found to be relevant: human nature and human concerns are not as one-dimensional as assumed by a unitary theory like utilitarianism. People are interested for example in each of past-, present- and future-oriented criteria. And being open to different kinds of value and meaning may be important for a society's ability to adapt and grow as conditions change.

6. Conclusion and further reading

The main objective of this paper has been to help readers to recognize different criteria of equity and appropriate distribution. We also suggested that it is unlikely, and presently unproven, that these different criteria can be justifiably reduced to just one or two via some unifying theory. This underlines that becoming familiar with all the criteria is important.

There is a rich systematic literature on the meanings of equity and the normative theory of distribution, and we conclude with suggestions for further reading. Thomas (1982) gives a bibliography especially oriented to urban and regional planners.

Blanchard (1986) is an elementary introduction for planners, with examples from urban policy. Beatley (1984) compares Rawlsian, utilitarian, and egalitarian principles in urban growth management. Sillince (1986), writing for British-type urban-and-regional planners, critiques the mainstream utilitarianism that has been taken for granted as "common-sense" by most working town planners in Britain. Sen (1984) is a more rigorous critique, with an economics focus; his Ch.12, which we drew on in section 3, is widely accessible. Another paper (Sen, 1979) launched his major attack on unconsidered utilitarianism in mainstream economics. Brittan (1983) is a partial defence.

Gaspar (1986) is a wider, less technical survey, that goes on to assess and apply some of the distributive criteria seen in literature on Third World development. It criticizes the American philosopher Robert Nozick (1974), who emerged as an opponent of the social democracy of Rawls and as a guru of Reaganism. Nozick's forceful attacks on equality were broadcast in development studies by Lal (1976), a leading World Bank adviser. Nozick, Lal, and the often sloppy but still influential Thatcherite Lord Peter Bauer (e.g. Bauer, 1981) are all pointed and readable. Other assessments of the ethics of the New Right on development are in Riddell (1985, 1986, 1987), with special reference to the case for international aid. Riddell (1987) also has a general survey of claims for redistribution. [13] Each of the different criteria are adopted by some Marxist or another; Nielsen & Patten (eds., 1981) give a good cross-section of opinions.

Finally, from the perspective of development practice, Schaffer & Lamb (1981) discuss limits to current philosophizing on equity, and the need too for political and organizational analyses. Rae (1981) is a clearer and profound analysis of problems in the concept, and hence also the application and organization, of equality.

Notes

[1] See for example the definitions in four papers by regional and physical planners to the RUPSEA conference in Harare, 1988 (emphases added): (a) "Regional development problem is one of inequality in the rates of development of subnational geographic regions and of the inequalities in the distribution of wealth and income that result"; (b) "Subnational Planning is basically a longterm process concerned with the rational location of productive forces and an overcoming of inequalities in the level of development of individual regions"; (c) "...the principal aim of the regional planning strategy (redressing the inherited and growing regional imbalances)..."; (d) "At the inter-regional scale, planners are concerned with, firstly, the planning of settlement systems, and secondly, planning for equity in the development of areas or regions". Van Raay et al (1985) have a similar definition.

[2] President Nyerere suggested that: "There are three aspects to the development of greater equality within a nation. One is differentials in personal incomes. The second is different degrees of access to public services, and the extent to which taxation-supported activities serve the interests of the people as a whole rather than those of a small minority. And the third is participation in decision-making" (Nyerere, 1977:48). All affect equality of opportunity. And there is also equality before the law. Nyerere did not highlight equality between regions, which does not necessarily increase equality between persons.

[3] This paper is on distributive equity. On contributive equity in taxation: "it is generally agreed that... those with the same ability should be asked to pay the same amount of tax and those with differing abilities to pay different amounts of tax, graded according to ability" (Chelliah et al, 1986:68).

[4] Blanchard himself gives a number of illustrations, including of how all of his criteria are applied, in series, to select families for an urban homesteading programme in Chicago.

[5] Tinbergen's theorem in policy analysis says that one needs at least one policy tool for every policy objective. Here for the three objectives of equitable distribution, production (implying land should not be left idle), and conservation, three tools are suggested: equal grazing allocations, plus a system of renting, plus a tax for improving grazing.

[6] "...[the President] said there had been instances where people who had jobs and had no pressing need for land were resettled at the expense of productive farmers. This mostly occurred where the beneficiaries were related to the officials who identified people eligible for resettlement" (The Herald, 27 March 1990). And it is largely impossible to enforce criterion 7; at most, people pass their previous landholding to a relative.

[7] There is no sharp line dividing "present" and "future"; strictly speaking we face gradations of short-, medium-, and long-term futures. And while I have spoken so far of needs as a present-oriented criterion, one can also consider fulfilment of needs in the future. So in the rest of the paper I will mainly just contrast future-oriented and past-oriented criteria.

[8] Economists sometimes find it hard to grasp ethics that refer to the past, not to the future and the effects of different present allocations. When economists do look at past actions they often assume these must be weighed according to their contributions to social welfare, i.e. by a type of desert criterion - which is not the entitlement theory criterion.

[9] One can see a mix of criteria also in this statement: "[a] It is necessary to avoid payment defaults which could destabilise the international financial system... [b] Debtors have rights, and [c] respect for the contract by both parties sustains the essential trust factor... [d] The duties of commercial banks towards their depositors are essential and must be fulfilled... However, [e] creditors cannot demand contract fulfilment by any and all means, especially if [f] the debtor is in a situation of extreme need." (Vatican Justice & Peace Commission, 1987).

[10] See also the version of Cde. Ushewokunze's position in "The Sunday Mail", Harare, 2 July 1989. Around that time, newspapers reported that workers on one of the farms held in the name of Cde. Ushewokunze's wife had not been paid for months, and were later dismissed en masse. Other, partly similar, cases have been reported since.

[11] "In the 1940s and 1950s [in Zimbabwe, many] low density residential areas in the same mould as Mount Pleasant were established. One acre stands became the accepted norm and are with us to this day" (Chikowore, 1989:3). One hears some Zimbabwean professionals declare they cannot live on a quarter-acre plot, and need an acre, or at least three-quarters, to bring up a family properly. The Minister responsible opined that: "To my mind, the standard of one acre plots will become a thing of the past...[given] the need for economy... [But] I am fully aware that those accustomed to seeing, enjoying and possibly envying or aspiring for one acre residential properties will most probably be disappointed by my observation" (loc.cit.). The outcome of this conflict of goals remains to be seen. While most new areas are higher density, there are few steps yet towards increasing the density of building in the existing super "low-density" suburbs.

[12] A simple example is that increasing equality between different parts of the middle and upper classes, by levelling up, can sometimes increase overall societal inequality. "In the urban areas [in Zimbabwe], very high standards of housing, with electricity, water and sanitation, are insisted upon, in part so as not to be seen to be providing facilities inferior to those built in the Rhodesian Front era, but the unseen consequence of this is a lack of resources to provide even the basics in the rural areas" (Robinson, 1988:2). While "people in towns enjoy highly subsidised piped schemes, rural dwellers are now called upon...to contribute" to capital costs of improved supplies and for maintenance (ibid.:7).

[13] A reviewer of this book, from a recipient country (Zimbabwe), saw no point "to ask...whether there is a moral obligation to give aid or not" (Moyo, 1988:80); but even if one agreed, nearly all the arguments that Riddell considers apply also in domestic contexts, as we saw. It is not a coincidence that Riddell earlier made his name with studies of poverty and the land question in Zimbabwe.

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