

PART I

Introduction and Fundamentals

Demographically, the Middle East and North Africa (MENA) region has one of the highest population growth rates in the world. The demographic shifts have profoundly affected economic, political and social institutions. Furthermore, the recent period of unprecedented political turbulence has complicated the picture. In 2010, MENA political uprisings and resistance movements began in Tunisia and spread to Egypt, Libya and Yemen. Civil uprisings erupted in Bahrain and Syria; in Bahrain, it was short-lived while in Syria, it has evolved into a continuous and violent crisis. More uprisings emerged in different countries of the MENA such as Algeria, Iraq, Jordan, Kuwait, Morocco, Oman, Saudi Arabia and Lebanon, and clashes arose along the borders of the Israeli and Palestinian territories. Granted, uprisings are not new phenomena in the MENA region, but the timing, the domino effect and the level of intensity of the current shifts in culture, politics and economics deserve critical evaluation.

The challenge facing social scientists and policymakers is to discern both the causes and the effects of these economic, political and social changes. Understanding the links and causal relationships between population dynamics and social and political transitions in the MENA region will offer scholars and policymakers an additional key to decipher the complicated matrix.

This book aims to place regional MENA demographic changes within their social, political, cultural and economic contexts to further our understanding of the complex relationships among these factors. Frequently, I use a “gender lens” analysis to highlight the importance of a gendered perspective.

My approach to explaining the underlying causes of the contemporary social changes and transitions in the MENA is interdisciplinary. Recent events in the MENA precipitated new bodies of literature on social movements, international relations and democratization, to name a few. The focus of much of this literature by social scientists,

analysts and policy experts is on the cause and effect of the political turbulences witnessed in the region. There are many pieces to analyze and many questions to answer. The analyses are varied and thought provoking but often nested in the discipline of the expert and may not paint a complete picture. Like in many other social movements throughout history and in different regions of the world, I perceive the political unrest in the MENA as a symptom of a more complex and deeper social transformation rather than a reaction to an explicit series of events.

As a social scientist, my goal is to apply multiple levels of analyses (macro, micro and mezzo) to various theories. I believe merging diverse perspectives will offer a broader and more comprehensive picture of contemporary social changes in the MENA region. The methodology for my analysis uses social, economic, demographic, historical and political theories and data, indicators and indices as well as single-country and comparative case studies. As I go through the different components, I limit the analyses to specific topics, but the angle of observation will arise from various disciplines (e.g., demography, philosophy, anthropology, history, sociology, political science and gender and sexuality studies). I am the first to admit that as much as I have tried to cross disciplines, the selection of topics and pieces obviously reflects my own areas of expertise and biases. To the extent that I have tried to incorporate so much analysis into one book, it is likely I missed some pieces. Consequently, I ask my readers to take my limitations into account.

To contextualize demographic and sociopolitical transformations in the MENA region, the focus of this book is multidimensional. We see, first, how demographic transitions have shaped and continue to shape the sociopolitical landscape of the MENA region, and, second, how the MENA's process of modernization illuminates its development and transition to democracy. Understanding these dimensions helps clarify the political unrest and social changes that are taking place in the MENA.

To begin, we need to lay out the dominant theoretical perspectives. Chapters 1 and 2 focus on contextual theories and perspectives (e.g., modernization, multiple modernities and the role of piety within the context of development and demographic transition). The causal relationship between development and democracy is discussed, along with demographic transition theories, and mediating factors that influence both.

These provide the background for explaining transitions in the MENA region, transitions that can be described as *change* and *continuity*.

Chapter 3 touches on the consequences of economic development and demographic change in the MENA with specific attention to the relationship between regional oil wealth and labor migration. Chapter 4 focuses on political transitions springing from changing demographics and developments with respect to gender and sexuality in the MENA. With development, gender roles and sexual preferences resurface as a human rights issue. The question to keep in mind is, under what circumstances and through what mechanisms are these roles and statuses being challenged? To see the big picture, it is important to understand those changes within the context of today's MENA region. Chapter 5 focuses on the historical and socioeconomic dynamics and dimensions of politics and society in Yemen, Qatar, Tunisia and Iran. Each of these countries has a unique past and faces contemporary challenges along its path to continued development toward a democratic society – all within the context of demographic transition. I specifically chose those countries that I consider very different (developmentally, demographically and democratically – the three *D*'s) yet similar in many dimensions and dynamics to show the patterns, challenges, similarities and differences in their experiences. Chapter 6 concludes the arguments.

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1 *Development, Piety, Elements of Democracy and the MENA Region*

This chapter introduces the diverse, complex and often conflicting impact of development, industrialization and globalization on the process of democratization. The goal is to understand the big picture, introduce different theoretical and empirical layers and then situate the MENA region within that context.

The Big Picture: Globalization

What is globalization and how does it relate to development, social and political change, modernization and demographic and democratic changes in the world and in the MENA region? Before we focus on specific theories, it is important to understand the phenomenon of globalization and how it fits with our theoretical perspectives.

The phenomenon of globalization is multidimensional and theoretical explanations are interdisciplinary. To explain different theoretical discourses on globalization and their causal determinants, William Robinson, a scholar of social transformations of societies, identifies five determinants of globalization (2007: 125): (1) the emergence of the globalized economy; (2) the emergence of global political processes; (3) the emergence of global cultural patterns and practices; (4) the emergence of inter- and intracontinental immigration patterns and transnational population movements; and (5) the emergence of new forms of global social hierarchy and inequality (e.g., based on class, gender, race, ethnicity, age). I add one more to the list: (6) demographic transitions as social transformation. Most population growth is taking place in today's developing world, and consequently the preponderance of the younger generation (productive labor, skill and brains) lives in the developing world.

Globalization is often referred to as a *process* and sometimes as a *condition*. Robinson questions the causal effect of globalization and states that most theorists see globalization "as a process of transformation

and some theorists [therefore] refer to globalization as a process and globality as a condition” (2007: 127). Within the same context, Robinson asks the following questions: does globalization refer to a series of steps, actions, changes, or functions [process]; or does globalization refer to existing circumstances and social positions [condition]? (p. 127). The process of globalization is about *change*, but *change* that is *continuous*. *Change and continuity* are key to any process of transition and transformation.

World Systems and Dependency Theory

Marxist-influenced theoretical perspectives, such as world systems theory and its close cousin dependency theory, emphasize the postcolonial experiences of the nations that were colonized by the industrialized nations. These theories focus on external factors such as insufficient capital, global exploitation of a nation’s resources, European colonialism and their relationship to global capitalism systems (Amin, 1974, 1997; Frank, 1966, 1979; Landes, 1998). Samir Amin (1974, 1997), for example, explains the discrepancy between developed and developing nations within the context of articulated and disarticulated economies where developed nations have a highly articulated economy that developing nations cannot possibly compete with.

World systems theory was one of the prominent theoretical explanations of social change during the first half of the twentieth century, mainly during the postcolonial and post–World War II era. World systems theorists have a different explanation of how and why modernization is shaped differently in different countries. The world systems theorists contend that the nation-state system is set up as a global system of stratification where nation-states are not separate beings but operate as one interdependent unit (Arrighi, 1994; Wallerstein, 2004; Wallerstein and Hopkins, 1996).¹

¹ This unit is stratified into three categories of nations:

- 1) Core: countries that are in the advanced industrial stage.
- 2) Semi-periphery: countries that are considered middle income and semi-industrialized. Their own development is somewhat dependent on the exploitation of peripheral countries. Their economy and politics are often limited and controlled by the core countries.
- 3) Periphery: countries with the lowest level of development whose resources are mostly exploited by core and semi-periphery nations.

Proponents of this theory such as Wallerstein and Arrighi emphasize the interdependency of this exploitative system. Single societies do not develop in a vacuum but as part of the postcolonial, capitalist and globalized world system. This pattern has its own historical roots in colonialism and slavery. With globalization and the evolution of the world system, Wallerstein and others point to developing economies' difficulty in improving their status (Sanderson and Alderson, 2005: 201). Other proponents of this perspective put a more positive spin on this arrangement and point out that the global division of labor could be beneficial to developing nations since it provides an opportunity to be included in the global system and to transform their economies (Evans, 1995). Some scholars point to the involvement of multinational corporations in developing economies and contend that this involvement does not necessarily harm semi-periphery and periphery nations. As a matter of fact, it could help them stimulate their economic and industrial growth (De Soya and O'Neal, 1999; Firebaugh, 1996, 1999; Hein, 1992). In sum, Wallerstein and other proponents of world systems theory contend that globalization is not a new phenomenon or a recent creation. It has been in existence for more than 500 years (Wallerstein, 2000). In his later work, "Globalization or the Age of Transition?", Wallerstein predicts the twenty-first-century world system transitioning to something else, something new and thus far undefined. The new transition will take shape by the mid-twenty-first century (around 2050). In the meantime, the modern world system is "open to human intervention and creativity" (Wallerstein, 2000: 251).

Developmentalism and Change

The theory of modernization, under the umbrella of developmentalism, was considered the dominant theory of development more than half a century ago. Many foreign policy advisors and international policy-makers (e.g., the World Bank and the International Monetary Fund) based their strategic planning on this perspective. In recent decades, strategic development planning has shifted to recognizing the importance of community participation and the contributions of civil society organizations in facilitating developments in the developing world.²

² See, for example, the work of Deepa Narayan of the World Bank, who bases her work on the importance of civil societies and people's participation from the

The core of the modernization perspective is that the internal deficiencies of a society are the reason for its lack of progress. It predicts that the process of industrialization and development will have the same positive effect on non-Western nations as it had on the Western world. In point of fact, this process took on a life of its own in non-Western countries and did not “behave” precisely as it did in the Western world. Over the past few decades, the literature has been directed toward understanding the development process in developing countries independent of the Western experience. For example, the role of religion in modern societies is dismissed in modernization theory. It is viewed as a hurdle to modernization. As societies become more modern, tradition does not have a place because it is identified as a sign of “backwardness” and the opposite of being “modern.” In contrast, multiple modernities scholars reject the notion that religion is insignificant in modernizing societies. Other theories of change also dismiss some of the modernization theory claims. They conclude that the experiences of developing countries in various parts of the globe are unique and most likely do not follow the Western world’s path toward modernization. Each country has different historical, social, cultural and political experiences that contribute to how they experience modernization and development. (See Table 1.1 for more explanation)

Developmental theorists argue that for societies to modernize, they need to experience development. Development is about change and how to accomplish change. Conceptually, development is about measurable and significant growth within the context of social, economic and political institutions, but it draws subtle lines between growth and development. Payne and Nasser explain it as such:

Growth is usually associated with the development of natural resources and the construction of an infrastructure [that] effectively utilizes those resources . . . Growth is seen as quantitative increases in economic activities, a larger economy, and more money. Development . . . is viewed as a more equitable distribution of economic resources . . . but it is difficult to separate growth from development. A growing economy is more likely to produce

ground up in promoting empowerment and a democratic process to help the poor to get out of poverty. Refer to the references for her list of publications with that focus: *Cross-Disciplinary Perspectives on Mobility, Success from the Bottom Up, The Promise of Empowerment and Democracy in India* and *Rising from the Ashes of Conflict*.

Table 1.1 *Crude sketch of the demographic transition of societies based on the level of development and industrialization*

	Preindustrial	Industrial	Postindustrial
Level of urbanization	Least urbanized, mostly rural	Development and expansion of cities, more urbanized but still heavily rural	Mostly urbanized, low level of rural and farming communities
Main industry (where most jobs are located)	Agriculture, farming	Manufacturing, production	Service, knowledge/information technology
Demographic characteristics	High fertility, high mortality, low population growth due to high fertility and high mortality	Declining fertility, declining mortality (mortality drops sharply and faster than fertility rate), population growth due to drop in mortality rate and still high or declining fertility rate	Low fertility, low mortality, high level of male and female education, low population growth due to low fertility and low mortality
Educational attainment	Formal education is very low for both sexes	Improvement in primary and secondary educational levels for both sexes compared with the farming communities. Illiteracy rate becomes smaller due to	Nearly everyone is literate in industrialized societies, with a secondary school education. A high proportion of people have attended college

Table 1.1 (cont.)

	Preindustrial	Industrial	Postindustrial
		the universal schooling laws and practices.	and attained a college degree.
Female work characteristics	Relatively high level of female labor force participation, mainly agricultural work (farming, petty trade, etc.)	Low level of female labor force participation	Increase in female work, mainly in the service sector

Adopted and updated from Haghighat (2010, 2012)

greater benefits for more people than a stagnant or declining one. A more useful definition of economic development encompasses growth, sustainability, equity, and human development. (2012: 100)

Economic resources are often measured by Gross Domestic Product (GDP) or Gross National Product (GNP). The Human Development Index (HDI) and Gender Development Index (GDI) measure the distribution of economic resources and its impact on quality-of-life measures such as access to health care, education, housing, a safe environment and security. Economic development is a close cousin of political development. In a top-down or a ground-up strategy, governments and institutions might encourage (or hinder) development by protecting (or not protecting) property rights, facilitating entrepreneurship, maintaining political order and peace, enforcing laws and policies, providing employment and providing access to resources such as health care, education and other public services.

Developmentalism and modernization have their origins in the classical economic model (sometimes referred to as neoclassical theory). This model is heavily influenced by environmental factors such as industrial development (e.g., infrastructure improvements, public service facilities and resources) and to some degree by cultural factors.