

Article

# Human development, inequality and social risks in Latin-America and the Nordic countries

by

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## **Abstract**

### *English:*

This article provides an overview and analysis of human development, inequality and people's perception of social and economic risks in Latin America and the Nordic countries. While Nordic countries rank very highly on the UN's Human Development Index (HDI) and are known for their 'Nordic welfare model', Latin American countries have been making significant progress economically, and with regard to health and education. However, inequality levels remain high throughout Latin America, representing an obstacle to further human development in the region. This is evidenced in the UN's inequality-adjusted HDI data, among other sources. High levels of inequality translate to a poorer-than-average social welfare for significant portions of the populations in Latin American countries. To a large extent, actual living conditions are reflected in what people perceive as social risks when looking ahead and thinking about their own prospects, as well as those of their families. Improved and more equal living conditions are therefore likely to change people's life satisfaction, in addition to what they are the most concerned about. In this article, people's perception of social risks in selected Latin American and Nordic countries is analysed based on data from the OECD's Cross-National Survey on Social and Economic Risks.

*Keywords:* human development, welfare, inequality, social risks, Latin America, Nordic countries

### *Spanish*

## **Desarrollo humano, desigualdad y riesgos sociales en América Latina y los países nórdicos.**

Este artículo propone una panorámica y análisis del desarrollo humano, la desigualdad y la percepción del riesgo social y económico de las personas en países nórdicos y latinoamericanos. Mientras que los países nórdicos se ubican en posiciones altas en el ranking de las Naciones Unidas para el Indicador de Desarrollo Humano (IDH), y son bien conocidos por su "Modelo de bienestar nórdico", los países latinoamericanos han venido teniendo significativos avances en la esfera económica, y con respecto a la salud y la educación. Sin embargo, los niveles de desigualdad se mantienen elevados en la región latinoamericana,

representando un obstáculo para avanzar en el desarrollo humano. Esto se evidencia en la base de datos de las Naciones Unidas sobre el IDH ajustado por la desigualdad, entre otras fuentes. Altos niveles de desigualdad se traducen en un bienestar social por debajo de la media para porciones significativas de la población de los países latinoamericanos. En un sentido más amplio, las condiciones de vida reales se reflejan en lo que las personas perciben como riesgos sociales, al analizar sus propias posibilidades de bienestar, y las de sus familias. Condiciones de vida mejoradas y más equitativas potencialmente modifican la satisfacción de las personas respecto a su existencia, añadidas a aquellas cuestiones que más les preocupan. En este artículo se analiza la percepción del riesgo social que desarrollan las personas en países seleccionados de América Latina y en países nórdicos. El análisis se funda en las bases de datos de la Organización para la Cooperación y el Desarrollo Económicos (OCDE) construidas a partir de las Encuestas Internacionales sobre Riesgos Sociales y Económicos.

*Palabras clave:* Desarrollo humano, Bienestar, Desigualdad, Riesgos Sociales, América Latina, Países nórdicos.

## **Introduction**

In order to understand the circumstances and challenges of social work in different regions of the world, we need some empirical knowledge about the living conditions in those regions. Comparisons of circumstances in different regions can inform discussions about common challenges, as well as our understanding of the status for human welfare in our own country, in a comparative perspective.

This article takes a bird's-eye view of the current situation for human development in Latin America and the Nordic countries. The primary data of the article are publicly available statistics from internationally trusted sources, such as the United Nations Development Programme (UNDP) and the Organization for Economic Cooperation and Development (OECD), typically focused on cross-country comparisons and international rankings. The treatment of human development will incorporate an account of inequality in these two regions, and a discussion of how inequality affects human development. Furthermore, data on people's perception of social risks in selected countries in both regions will be presented. This will give an idea about people's sense of social safety and their most pressing concerns, thus supplementing the more objective measures on human development and inequality with a somewhat more subjective approach. Taken as a whole, these investigations should result in a fairly comprehensive and up to date overview of current welfare outcomes and perceptions in Latin America and the Nordic countries.

In this article, Latin America is to be understood as independent countries in the Americas where Spanish, Portuguese or French prevail. This includes most of Central and South America, and some countries in the Caribbean, namely Cuba, the Dominican Republic and Haiti. Though this is a widely used definition, it has some limitations, due to the fact that it is based upon a mixture of geographical and linguistic traits that points to historical intermingling with the Romance culture of European colonial powers. Alternative definitions could, e.g., include areas south of the US where other languages prevail, or any area in the Americas where Romance languages prevail (including parts of Canada and the US). In the context of this article, 'the Nordic countries' similarly refer to the five sovereign states in the Nordic region (which are located in Northern Europe and the North Atlantic Ocean), namely Denmark, Finland, Iceland, Norway and Sweden. Like Latin America, the Nordic countries are also regarded as both a geographical and cultural unit, which to a large

degree has a common history. In terms of language, Finland stands out with its Finno-Ugric (rather than North Germanic) language. Given this article's main focus on the general population of the surveyed countries, a concise geographical delimitation of the Nordic countries is not required. However, it can be noted that dependent territories of Nordic countries include Greenland (Denmark) in North America and the uninhabited Queen Maud Land (Norway) in Antarctica – which is the only region of the planet where Nordic and Latin American powers both make territorial claims (as Antarctica also encompasses the Chilean Antarctic Territory and Argentine Antarctica).

Except for the battle for Antarctica, Nordic countries do not have as much interwoven history with Latin America as certain other European countries do – notably the colonial powers of Spain, Portugal and France. Nor do they have the linguistic ties to Latin America that this shared history has resulted in. Nevertheless, comparing human development in Latin America and the Nordic countries makes sense, due to the strong performance of the Nordic region in terms of human development. Among demographers and economists, it is commonplace to assume that other countries will eventually follow similar development paths as the most 'developed' countries (see e.g. Maddison, 2003). Given the Nordic achievements in this regard, it is possible, though not obvious, that Nordic welfare models can serve as role models for Latin American countries. Key questions in this discussion concern the transferability of Nordic experiences to other cultural and political contexts, and whether social policies in different countries aim to realize the same core values, which is something that cannot be assumed uncritically. For a classical critique of 'professional imperialism' in the context of transfers of welfare models and social work ideas from the Global North to the Global South, see Midgley (1981).

At its core, the Nordic model of welfare state is a universal welfare state, where public services such as education, health care and social assistance tend to be offered to all citizens without discrimination. The fact that 'everybody benefits' from welfare schemes has been said to explain the wide support of central welfare policies in the Nordic countries across socioeconomic class divisions (Rothstein, 2000). Besides universalism, Nordic welfare states are characterized by generous benefits, which contribute significantly to high levels of equality, while the Nordic countries also

stand out internationally by way of people's high levels of trust in their fellow citizens and public institutions (Kangas & Kvist, 2013).

In contrast, due to an 'uneven pace of industrialization', social security schemes developed at different stages in Latin American countries, with Argentina, Brazil, Chile, Uruguay and Cuba being the first to establish such schemes in the 1920s (Huber & Bogliaccini, 2010: 645). In Columbia, Costa Rica, Mexico, Paraguay, Peru and Venezuela, 'the main schemes were installed in the 1940s', and in some of the remaining countries, they were established even later (*ibid.*). However, health coverage and the coverage of social security have varied substantially, with less than half the population in many countries covered as late as in 1980 (*ibid.*, 645–646). In more recent times, social expenditures (public spending on social security, welfare, health and education) remain substantially lower in Latin American countries than in the Nordic countries (*ibid.*, 649).

Not so long ago, it was customary to refer to the Nordic countries as 'developed' countries, and to Latin-American countries as 'developing' countries. While it remains the case that all five Nordic countries are more affluent than any Latin American country (UNDP, 2018a), it no longer makes any sense to draw a sharp distinction between developed and developing countries in this manner. This is because several 'developing' countries in the course of the last few decades have been catching up with more 'developed' countries with regard to everything from education to life expectancy. That has been possible due to economic growth rates that have generally surpassed those of the already wealthy countries. Two countries in Latin America, namely Chile and Mexico, are so economically advanced (and committed to free markets) that they have become members of the Organization for Economic Cooperation and Development (OECD), an organization that has traditionally been perceived as a club for wealthy countries.<sup>1</sup> As we will see later on in this article, the proportion of the population that struggles with extreme poverty in many Latin American countries is now quite low, though inequality remains a continent-wide problem.

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<sup>1</sup> Mexico has been a member of the OECD since 1994, while Chile became a member in 2010. The clout of Mexico in the OECD is illustrated by the fact that both the OECD's current Secretary General (Ángel Gurría) and its Chief of Staff (Gabriela Ramos) are Mexicans.

In 2001, the investment bank Goldman Sachs (2001) identified Brazil as one of the 'BRICs', an acronym for four large emerging global markets (Brazil, Russia, India and China), thereby identifying Brazil as a Latin American giant in economic terms. Their core prediction was that the influence and global significance of the economies of the BRIC countries, and other so-called emerging markets, would grow over the next 10 years. In follow-up papers and reports (2003, 2007), Goldman Sachs predicted that in the near future the size of the BRIC economies would equal or outrank that of major 'developed' countries. Since then, Brazil has had some ups and downs, with millions lifted out of poverty under Lula's presidency (2003–2011), and with a chaotic political and economic situation since 2014 or so (Gethin & Morgan, 2018), culminating in the election of the far-right populist Jair Bolsonaro as president in the autumn of 2018 (Brazil's current political situation is discussed in the section 'Effects of inequality on human development'). Brazil's persistent inequality remains a major welfare challenge. A recent report from the New Development Bank (2017) indicates that the portion of the population living in extreme poverty is today about as low in China as it is in Brazil, and that by 2030 Brazil might be the only BRIC country with some people living under such conditions (with 1% living in extreme poverty, defined as less than \$1.25 income per day in Purchasing Power Parity (PPP) terms).

One of the reasons why Nordic welfare schemes may not be directly transferable to other countries is differences related to the makeup of labour markets. In Chile, the share of the workforce that is in temporary employment is higher than in any other OECD country (OECD, 2018c: 2; data are lacking for Mexico). Furthermore, both Chile and Mexico are among the five OECD countries with the highest shares of self-employment, with approximately 30% of the workforce being self-employed. In comparison, less than 10% are self-employed in Norway and Denmark. As the OECD notes, those who are 'self-employed or employees [...] with very short-duration contracts [...] tend to have less access to social protection' (OECD, 2018c: 1). In effect, '[r]ising numbers of non-standard workers may [...] erode the effectiveness of social protection systems', and 'if non-standard work increases due to globalisation and digitalisation, closing gaps in social protection will become more urgent' (ibid.). The main question to ask in this context is whether social protection schemes cover the entire population, and not just those in standard jobs. While the issue of social

protection for non-standard workers is important enough in OECD countries, including Chile and Mexico, it might be even more critical in several Latin American countries with a lower standard of living, and with similarly high shares of the workforce being self-employed or on short-duration contracts.

### **Comparing human development in Latin America and the Nordic countries**

The Human Development Index (HDI), launched by the UNDP in 1990, aims to provide comparable key data on human development for all countries. HDI is a composite index based on three topical indices, namely a life expectancy index (a proxy for health), an education index and a Gross National Income Index. Each of the three indices are presented in terms of index values between 0 (lowest development) and 1 (highest development), and summarized in the HDI value, which is similarly somewhere between 0 and 1. In practical terms, the data that matters given the way HDI is calculated is the number of years of life expectancy at birth<sup>2</sup>, expected years of schooling for children, mean years of schooling for adults and Gross National Income per capita. For a more detailed and nuanced description, see UNDP 2018c.

As shown in Table 1, all five Nordic countries are classified by UNDP as having 'Very high human development', and all five rank among the 20 most developed countries globally. In comparison, only three Latin American countries – Chile, Argentina and Uruguay – have the same classification, and these are ranked significantly below the lowest-ranked Nordic country (Finland). According to the same data, 11 Latin-American countries have 'High human development', and five have 'Medium human development', while one – Haiti – has 'Low human development'.

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<sup>2</sup> Life expectancy is calculated by the ages of all those who die in a given year, on the assumption that people born that same year can expect a similarly long life.



**Table 1: Human Development in Latin America and the Nordic countries**

*Italic = Nordic countries; colour (shades of grey) indicates level of human development (no colour = Very high human development; light grey = High human development; grey = Medium human development; dark grey = Low human development)*

HDI ranking	Country	HDI value	Life expectancy at birth (years)	Expected years of schooling	Mean years of schooling	Gross national income (GNI) per capita (2011 PPP \$)
1	<i>Norway</i>	0.953	82.3	17.9	12.6	68.012
6	<i>Iceland</i>	0.935	82.9	19.3	12.4	45.810
7	<i>Sweden</i>	0.933	82.6	17.6	12.4	47.766
11	<i>Denmark</i>	0.929	80.9	19.1	12.6	47.918
15	<i>Finland</i>	0.920	81.5	17.6	12.4	41.002
44	Chile	0.843	79.7	16.4	10.3	21.910
47	Argentina	0.825	76.7	17.4	9.9	18.461
55	Uruguay	0.804	77.6	15.9	8.7	19.930
63	Costa Rica	0.794	80.0	15.4	8.8	14.636
66	Panama	0.789	78.2	12.7	10.2	19.178
73	Cuba	0.777	79.9	14.0	11.8	7.524
74	Mexico	0.774	77.3	14.1	8.6	16.944
78	Venezuela	0.761	74.7	14.3	10.3	10.672
79	Brazil	0.759	75.7	15.4	7.8	13.755
86	Ecuador	0.752	76.6	14.7	8.7	10.347
89	Peru	0.750	75.2	13.8	9.2	11.789
90	Colombia	0.747	74.6	14.4	8.3	12.938
94	Dominican Republic	0.736	74.0	13.7	7.8	13.921
110	Paraguay	0.702	73.2	12.7	8.4	8.380
118	Bolivia	0.693	69.5	14.0	8.9	6.714
121	El Salvador	0.674	73.8	12.6	6.9	6.868
124	Nicaragua	0.658	75.7	12.1	6.7	5.157
127	Guatemala	0.650	73.7	10.8	6.5	7.278
133	Honduras	0.617	73.8	10.2	6.5	4.215
168	Haiti	0.498	63.6	9.3	5.3	1.665

Source: Human Development Indices and Indicators – 2018 Statistical Update (UNDP, 2018a)

While the Nordic countries have HDI values in the range of 0.920–0.953 overall, the HDI value for ‘Latin America and the Caribbean’ is 0.758, slightly higher than the world average of 0.728 (UNDP, 2018a: 25). This regional average is below the HDI value for ‘Europe and Central Asia’, but higher than that of ‘East Asia and the Pacific’, ‘Arab states’, ‘South Asia’ and ‘Sub-Saharan Africa’. This fairly good showing is reflected in the fact that 13 of the 20 Latin American countries rank among the 100 most developed countries in the world, out of 189 countries ranked by the UNDP.

As Table 1 shows, life expectancy is now 80 years in Costa Rica and close to 80 years in Chile and Cuba, compared to 80.9 years or more in the Nordic countries.

With the exceptions of Haiti and Bolivia, life expectancy is well above 70 years throughout Latin America. Similarly, expected years of schooling for children is above 10 years for all countries in Latin America with the exception of Haiti, compared to 17.6 years or more in the Nordic countries. The difference between expected school years for children and mean years of schooling for adults indicates the progress that has been made in terms of education over the last several years. Today's young generation in Latin America is on schedule to acquire significantly more education than their parents. Meanwhile, income is generally increasing year by year, though income levels vary widely both among countries, and as we shall see in the next section, within them.

### **Inequality in Latin America and the Nordic countries**

The executive summary of the World Inequality Report 2018 (Chancel et al., 2017b: 9, cf. also Chancel et al., 2017a) displays a figure named 'the elephant curve of global inequality and growth' (Figure E4), since the curve has the appearance of an elephant with its trunk in the air. What the figure shows is how much real income has increased from 1980 to 2016 for different income groups. Real income per person has increased for all groups, but it has increased the least for those with an income in the middle of the income spectrum, i.e., the middle class. Real income has increased considerably more for the poorest 40 to 50% of people globally, many of whom have doubled their incomes in this period. And income has grown the most for those who were already the very richest. While real income per person grew by roughly 50% from 1980 to 2016 for the middle earners globally, those already among the 0.001% richest (i.e. 1 in 100,000) more than tripled their income.

As displayed in the elephant curve, similar patterns in income development have occurred in both Latin America and the Nordic countries over the last few decades. In Chile, the share of total income earned by the top 1% increased from approximately 15% before Pinochet's coup in 1973, to between 20% and 25% since 1990 (Atria et al., 2018: 23; the article considers the period from 1964–2015). The share of the top 1% increased in Sweden as well, with a doubling from a low point in the early 80s (ca. 4%) to the period since the late 90s, but from much lower levels (ibid.). In the meantime, Brazil has been, and remains, the most unequal BRIC country in terms of income inequality by a large margin, despite the fact that Russia and China have

become much more unequal over the last 30 years or so (Prokurat & Fabisiak, 2012: 127; see also Morgan, 2017), and despite fairly recent efforts to reduce inequality (Gethin & Morgan, 2018).

Table 2 below shows key facts about income inequality in Latin America and the Nordic countries as of today. Data on Quintile and Palma ratios and Gini coefficients are taken from UNDP 2018a: 30–33, whereas data on the share of Gross National Income (GNI) of the top 10% of earners in each country are gathered from the *World Inequality Database* (2018). Countries are ranked by their Gini coefficient, which is a measure of income distribution, where 0 means absolute equality (everybody has equal income) and 100 means absolute inequality (one person has all the income). Accordingly, a low value indicates a low level of income inequality; a high value indicates a high level of income inequality.

**Table 2: Income inequality in Latin America and the Nordic countries***Italic = Nordic countries*

Rank	Country	Gini coefficient	Top 10% share of GNI	Quintile ratio	Palma ratio
1	<i>Iceland</i>	25.6	n/a	3.6	0.9
2	<i>Finland</i>	27.1	32.5%	3.9	1.0
3	<i>Norway</i>	27.5	28.3%	4.1	1.0
4	<i>Denmark</i>	28.2	26.9%	4.0	1.0
5	<i>Sweden</i>	29.2	30.6%	4.6	1.0
6	Uruguay	39.7	45.2%	7.9	1.8
7	El Salvador	40.0	n/a	7.9	1.9
8	Haiti	41.1	n/a	8.6	2.0
9	Argentina	42.4	n/a	9.5	2.1
10	Mexico	43.4	n/a	8.8	2.3
11	Peru	43.8	n/a	10.6	2.3
12	Bolivia	44.6	n/a	12.6	2.4
13	Ecuador	45.0	n/a	10.7	2.4
14	Dominican Republic	45.3	n/a	10.4	2.5
15	Nicaragua	46.2	n/a	10.2	2.6
16	Venezuela	46.9*	n/a	15.8*	2.8*
17	Chile	47.7	54.9%	11.2	2.8
18	Paraguay	47.9	n/a	11.8	2.9
19	Guatemala	48.3	n/a	11.9	2.9
20	Costa Rica	48.7*	n/a	12.9	3.0
21	Honduras	50.0	n/a	16.9	3.4
22	Panama	50.4	n/a	16.6	3.4
23	Columbia	50.8	n/a	14.3	3.4
24	Brazil	51.3	53.1%	15.6	3.5
n/a	Cuba	n/a	n/a	n/a	n/a

Sources: *Human Development Indices and Indicators – 2018 Statistical Update* (UNDP, 2018a); *World Inequality Database* (2018)

\* Data refer to a year earlier than 2010. All other data are from 2010–2017 (most recent year available).

Looking at these data, it is striking that the five Nordic countries all have a substantially lower Gini coefficient than any Latin American country. Whereas all the Nordic countries have a Gini coefficient below 30, among the Latin-American countries, only Uruguay and El Salvador have a Gini coefficient below or at 40; hence, the distance to the Nordic values is significant.

This is reflected in the fact that the Palma ratio is almost twice as high in the most equal Latin American countries as it is in the Nordic countries. The Palma ratio tells us what share of the national income the richest 10% have compared to the share of the poorest 40%. While the combined income of the richest 10% in the Nordic countries more or less equals the combined income of the poorest 40% (implying that the average income per person is about four times as high among the rich), in Uruguay and El Salvador the combined income of the richest 10% of the population

is almost double that of the poorest 40% (implying that the average income per person is close to eight times as high among the rich).

Similarly, the Quintile ratio is about twice as high in Uruguay and El Salvador as it is in the Nordic countries. This is the ratio of 'the average income of the richest 20% of the population to the average income of the poorest 20% of the population' (UNDP, 2018: 33). While the Quintile ratio for Nordic countries is within the range from 3.6 to 4.6, for Latin-American countries it is in the range of 7.9–16.9. In other words: Whereas the richest 20% in the Nordic countries have an income that is 3.6–4.6 times higher than the income of the poorest 20%, in Latin American countries the richest 20% have an income that is 7.9–16.9 times higher than the income of the poorest 20%. Even in Sweden, the least equal of the Nordic countries, income distribution is significantly more equal than in the most equal of the Latin American countries.

In Brazil and Chile, the combined income of the richest 10% of the population is more than half the national income (World Inequality Database, 2018). In other words, the total income of the richest 10% is higher than all the income of the poorest 90%. In Brazil, still the most unequal Latin American country, the richest 10% of the population makes 53.1% of the national income, compared with 13.9% for the poorest 50%. In other words, the combined income of the richest 10% in Brazil is almost four times as high as the combined income of the poorest 50%, which implies that on average that the rich, at least on this measure, have an income that is 19 times higher than that of the poorest half of Brazilians.

Of course, the richest 10% of the population also have higher incomes in the Nordic countries, though their combined income is in the range of 26.9–32.5% of the Gross National Income. This means that after the richest 10% have had their share, approximately 70% of the national income is still there for distribution among the poorest 90% of the population. In contrast, in Chile only about 45% of the national income can be distributed among the poorest 90% of the population, and even in Uruguay, one of the most equal Latin American countries, only about 55% of national income can be distributed among the poorest 90%.

The effects of income inequality between rich and poor households may be reinforced by gender inequality, because female incomes tend to be lower than male incomes. This might be particularly significant for single-parent households with children. In the Nordic countries, the average female income is at least 70% of the average male income (UNDP, 2018a: 34), which is relatively progressive in an international context. The income gap between men and women is larger in Latin American countries. In Cuba, the Dominican Republic, Guatemala, Mexico and Nicaragua, the average male income is more than twice as high as the average female income – and it is exactly twice as high in Argentina (UNDP, 2018a: 34–37). The only Latin American country with Nordic-style levels of income equality between men and women is Haiti, the poorest country on the continent (even Cuban women earn 2.5 times as much as Haitian men). A country that comes close is Columbia, where women earn ca. 65% as much as men (and five times as much as Haitian men). In comparison, Nicaraguan, Mexican and Guatemalan women only earn 47–48% of what their male countrymen (sic) earn (ibid.).

The Nordic countries are known for having a high level of gender equality in comparison with other regions of the world (Esping-Andersen, 2009; UNDP 2018a: 38–41). This also applies to women's participation in the workforce (and girls' equal participation in education). While the Nordic countries have the lowest gender gap in the labour force participation rate among OECD countries (OECD, 2018b: 2), in the range of 3.0–6.3%, the gender gap is much more substantial in Latin America, though not as extreme as in South Asia and Arab countries (UNDP, 2018a: 38–41). For Latin America and the Caribbean as a whole, 77.5% of working-age men are in employment, compared to only 51.6% of working-age women, according to the UN's Gender Inequality Index (ibid.). The gender gap in labour force participation is thus 25.9%. According to the OECD, increases in women's employment accounts for 10–20% of the Nordic countries' GDP growth over the last 50 years (OECD, 2018b). Contemporary Nordic social policies aim to facilitate combining family life and work life, thus giving more equal opportunities in life for men and women. Authorities tend to regard such policies as a win–win situation, since they boost economic performance at the same time as they can be taken to promote progressive values with regard to gender roles and equal opportunity (Esping-Andersen, 2009).

Inequality can be assessed from different angles. For example, indigenous populations tend to have lower living standards than other inhabitants, with higher infant mortality, fewer years in school, more analphabetism and less access to basic infrastructure (UNDP, 2010). In Latin America, the indigenous population accounts for more than half the total population in Bolivia, and close to half in Guatemala, while it accounts for roughly 5 to 10% of the population in Panama, Honduras, Ecuador, Mexico and Chile (ibid., 26). In Mexico, which as we saw in Table 1 has an HDI of 0.774 (High human development), HDI values have been calculated for speakers of 44 different indigenous languages, with HDI values ranging from approximately 0.530 (Tepehua) to 0.700 (Zapoteco de istmo) (ibid., 40). In other words, all these indigenous peoples have lower scores on human development than the Mexican average, some of them significantly so.

Nordic countries encompass two different groups of indigenous peoples, one being the Greenlandic Inuits, who with about 50,000 people are the majority population on Greenland, which currently has a status as an autonomous country within the Kingdom of Denmark. Avakov (2012) estimates that the HDI of Greenland was 0.786 in 2010, which would qualify as 'High human development' and a ranking of no. 61 worldwide. The northern-most part of three of the Nordic countries, namely Norway, Sweden and Finland, are inhabited by the Sámi, an indigenous people with a Finno-Ugric language, who also live in neighbouring parts of Russia. Totalling some 80,000 people with about half of these living in Norway, the Sámi have historically suffered injustice, repression and marginalization, but have over time achieved an increasing self-determination and recognition of rights, e.g., with a Sámi Parliament established in 1989 (Baer, 1994). Current living conditions in Norwegian areas with a significant Sámi population were surveyed in Sønstebø (2018). These statistics indicate that for Sámi people overall, life expectancy at birth is marginally lower than for Norwegians generally (2.9 years less for men, 1.8 years less for women – ibid., p. 37), while education levels are significantly lower (for example, 38.3% have no school beyond primary and secondary education vs. 26.5% for Norwegians generally – ibid., p. 45), with total income per household being 15% lower than for Norwegians generally (ibid., p. 57). In summary, this implies that the Human Development Index of the Sámi people (at least those based in Norway) would likely be lower than but still quite comparable to that of Norway in general. The cited data from Sønstebø (2018)

suggest that Norwegian Sámi people are better off than the average among countries ranked by UNDP as having 'Very high human development' with regard to both life expectancy and income per capita, though probably not regarding education (UNDP, 2018a: 25; note that to the best of the author's knowledge, no official HDI values have yet been calculated for the Sámi population).

The Multidimensional Poverty Index (MPI) (most recently reported in UNDP, 2018a, cf. Alkire & Jahan, 2018 for a description of the most recent methodology) covers 11 Latin American countries among the 106 developing countries currently covered. There are no comparable data for Nordic countries, as MPI is not calculated for any Nordic country (only the very poorest European countries have MPI data, with the number of poor by this measure estimated to range in the 10s of thousands, e.g., in Moldova and Serbia). Multidimensional poverty is a measure of severe poverty, understood as acute deprivation of basic needs, based on 10 different indicators for health, education and living standards. For health, these are related to child mortality and nutrition, for education, they include school attendance, and for living standards, they include the availability of cooking fuel, toilet, water, and electricity. By this measure, there are about eight million poor people in Brazil and likewise in Mexico, about five million poor in Haiti and Guatemala, about four million in Peru, about two-and-a-half million in Colombia, more than two million in Bolivia and about one million in Nicaragua, while there are some 100,000 poor in Ecuador, El Salvador and Paraguay.

As a percentage of the total population, poverty is most prevalent in Haiti, where almost half the population lives in poverty according to MPI, followed by Guatemala (almost one-third), Bolivia (one in five), Nicaragua (one in six) and Peru (one in eight). In the other Latin American countries covered by MPI, less than one in 10 lives in poverty, with only 4–5% living in poverty in Brazil, Ecuador, Paraguay and Colombia, and somewhat more in Mexico. The dimension where the most severe deprivation occurs varies from country to country. In Brazil and Mexico, health (i.e. child mortality and/or nutrition) is the most critical factor, whereas in El Salvador, education stands out as the key problem. An insufficient standard of living for affected people is the major challenge in Bolivia, Colombia, Haiti, Nicaragua, Paraguay and Peru.



Altogether, the most recent MPI data indicate that there are currently 40 million people in Latin America living in multidimensional poverty, with a world total of 1.3 billion people living in poverty by this measure. A recent regional UNDP report (UNDP, 2016), focusing on 'multidimensional progress' in Latin America, demonstrates that the UN is now actively adapting policy analysis and advice to the concept of multidimensionality, going beyond narrow economic measures. This reflects recent OECD efforts to go 'beyond GDP' (Stiglitz, Fitoussi, & Durand, 2018).

### **Effects of inequality on human development**

The original version of the Human Development Index does not take account of inequality. As a result, average values for human development can be misleading, since many people in highly unequal countries will be worse off than the average. Unadjusted HDI values are therefore best understood as measures of the potential for human development in a country if it has no inequality. While there is no such perfectly equal country on Earth, some countries display considerably higher levels of equality than others, and this affects how we can understand the distribution, as it were, of human development in a given country.

Inequality-adjusted HDI (IHDI) is defined by the UNDP as a 'HDI value adjusted for inequalities in the three basic dimensions of human development' (UNDP, 2018a: 33), namely inequalities in life expectancy, education and income. 'When the HDI is adjusted for inequalities', according to the latest statistics (UNDP, 2018b: 1), 'the global HDI value falls 20% – from 0.728 to 0.582.' The loss in HDI value due to inequality tends to be greater the lower the level of human development, with those countries with 'Very high human development' losing about 10% compared with those countries with 'Low human development' losing about 30% (ibid., 3). One implication of this is that when inequality is taken into account, levels of human development show a much greater variation than when it is not. Read in isolation, the (unadjusted) Human Development Index obscures the ways in which rich and poor people in one and the same country have unequal prospects in life.

As detailed in Table 3, the Nordic countries all do well on the measure of inequality-adjusted HDI. In fact, all five Nordic countries are among the 10 countries in the world

with the highest IHDI values. It is noteworthy that Iceland and Finland have even lower levels of inequality than the three Scandinavian countries (Denmark, Norway and Sweden). This makes Iceland the country in the world with the highest level of human development when inequality is taken into account. Due to a low inequality in education and income in particular, Finland outperforms both Sweden and Denmark, and ranks fifth in the world given the latest UNDP data.

Among the Latin American countries, while two countries are among the 50 countries in the world with the highest human development, none are when inequality is taken into account. All the Latin American countries have consistently higher levels of inequality than the Nordic countries on all indicators (life expectancy, education and income). Moreover, with only two exceptions (El Salvador and Nicaragua), Latin American countries consistently rank lower on human development internationally when inequality is accounted for compared to when it is not. This can be taken to mean that the worst-off in Latin American countries are sometimes worse off (with a lower human development in terms of life expectancy, education and income) than most people living in some countries with lower HDI values. For Cuba, data for income inequality are missing, so no IHDI value is calculated by the UNDP.

**Table 3: Inequality-adjusted HDI (IHDI) in Latin America and the Nordic countries**

*Italic = Nordic countries; colour indicates level of human development (no colour = Very high human development; light grey = High human development; grey = Medium human development; dark grey = Low human development)*

IHDI ranking	HDI ranking	Country	HDI value	IHDI value	Overall loss in HDI due to inequality (%)	Inequality in life expectancy (%; 2015–2020)	Inequality in education (%; 2017)	Inequality in income (%; 2017)
1	6	<i>Iceland</i>	0.935	0.878	6.0	2.4	2.6	12.8
2	1	<i>Norway</i>	0.953	0.876	8.0	2.7	6.1	14.9
5	15	<i>Finland</i>	0.920	0.868	5.6	2.8	1.9	11.7
6	7	<i>Sweden</i>	0.933	0.864	7.4	2.7	3.7	15.3
9	11	<i>Denmark</i>	0.929	0.860	7.5	3.4	4.3	14.4
51	44	Chile	0.843	0.710	15.7	6.1	7.5	31.1
53	47	Argentina	0.825	0.707	14.3	9.5	6.2	25.8
59	55	Uruguay	0.804	0.689	14.3	9.0	7.4	25.3
73	63	Costa Rica	0.794	0.651	18.0	7.5	11.9	32.4
80	66	Panama	0.789	0.623	21.1	11.5	12.5	36.5
n/a	73	Cuba	0.777	n/a	n/a	5.3	10.9	n/a
82	78	Venezuela	0.761	0.636	16.5	10.5	12.9	25.2
87	74	Mexico	0.774	0.609	21.3	12.3	17.1	32.8
93	86	Ecuador	0.752	0.603	19.8	13.9	13.8	30.5
91	89	Peru	0.750	0.606	19.2	13.2	15.3	28.3
96	79	Brazil	0.759	0.578	23.9	10.8	22.0	36.7
97	94	Dominican Republic	0.736	0.581	21.0	15.4	19.1	28.1
102	90	Colombia	0.747	0.571	23.6	13.2	19.4	36.2
120	121	El Salvador	0.674	0.524	22.3	12.2	30.3	23.2
121	110	Paraguay	0.702	0.522	25.5	18.0	16.7	39.5
122	118	Bolivia	0.693	0.514	25.8	25.2	20.0	31.8
124	124	Nicaragua	0.658	0.507	22.9	12.9	25.7	29.2
132	127	Guatemala	0.650	0.467	28.2	16.0	35.0	32.2
137	133	Honduras	0.617	0.459	25.6	18.1	22.7	34.9
175	168	Haiti	0.498	0.304	39.0	28.6	38.3	48.4

Source: Human Development Indices and Indicators – 2018 Statistical Update (UNDP, 2018a)

Recent developments in Brazil, with the election of the right-wing populist Jair Messias Bolsonaro as president, illustrate the ways in which a deep-rooted inequality can play into political conflicts. After the election of Bolsonaro, progressive policies ranging from poverty reduction to basic human rights now face a backlash in Brazilian politics. Though also motivated by corruption scandals, security concerns and a collapse of trust in the political establishment, Bolsonaro's electoral victory was in large part related to opposition towards the welfare policy agenda and legacy of The Workers' Party (*O Partido dos Trabalhadores*, PT). Under PT's first two presidential terms in power, under the rule of Luiz Inácio 'Lula' da Silva, a deliberate left-wing poverty reduction agenda significantly reduced Brazilian poverty – but this happened at the cost of in effect squeezing the middle class (Gethin & Morgan, 2018).

According to Gethin and Morgan (p. 3), ‘unprecedented increases to the minimum wage and social assistance during Lula’s first mandate, and in particular *Bolsa Familia*, led to a dramatic change in the Workers’ Party’s voting base. Poor voters with low levels of economic security massively turned towards the PT.’ Since 1989, the poorest 50% of Brazilians have increasingly supported the PT or other left-wing parties (ibid., 2), at the same time as most of them have experienced significant increases in income due to PT policies.<sup>3</sup> However, while the income of the poorest 50% grew faster than the Brazilian average, the income of most of the middle class grew slower, and the income of the upper middle class (here understood as those among the 15%, but not the 5% richest in the country) actually decreased (ibid., 4). In other words, in socioeconomic terms, the poor were pitted against the middle class, rather than against the very richest, whose income increased more than that of the middle class.

In Gethin and Morgan’s words (ibid., 1), PT welfare policies had the effect of ‘directly improving the living conditions of the poor, and indirectly benefiting elites, largely to the neglect of the middle class’. An outcome of the PT’s welfare policies was that class cleavages widened in terms of income development, despite a reduced inequality. These socioeconomic developments have contributed to an escalating political polarization, which made Bolsonaro’s electoral victory on 28 October 2018 possible, given the massive support from the middle class. If there is a simple lesson to be drawn from this, it might be that welfare policies that aim to reduce inequality have a better chance of succeeding in the long-term if they benefit a majority of the population across socioeconomic divides.

### **Perception of economic and social risks**

Data from the OECD’s Cross-National Survey on Social and Economic Risks were first made public last year (OECD, 2018a). This survey investigates how concerned people are about, e.g., becoming ill or disabled, job security, income, having adequate housing and access to child care, education and care services for elderly and disabled family members. The survey is based on representative samples of the

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<sup>3</sup> PT ruled Brazil until President Dilma Rousseff, Lula’s follower, was removed from power after a dubious impeachment process in 2016.

populations in 19 countries, with surveyed countries including Chile, Mexico, Denmark, Finland and Norway. The key results for these five countries are presented in Table 4, with the top concern in the short- and long-term highlighted for each country.

**Table 4: Perception of economic and social risks in selected countries<sup>1</sup>**

<sup>1</sup> Percentage identifying risk as one of three greatest risks to themselves or their immediate family over the next year or two (short-term), or beyond the next decade (long-term)

Short-term risks	Chile	Mexico	Denmark	Finland	Norway
<b>Top concern</b>	Making ends meet	Crime or violence	Ill or disabled	Ill or disabled	Ill or disabled
Ill or disabled	51.9%	41.3%	53.5%	64.7%	54.6%
Losing job	43.6%	39.4%	29.1%	43.4%	24.0%
Adequate housing	32.2%	30.7%	29.3%	37.3%	32.6%
Making ends meet	53.2%	56.0%	31.4%	45.3%	38.9%
Childcare and education	11.2%	13.4%	14.4%	6.8%	14.2%
Long-term elderly care	23.4%	18.8%	19.0%	18.6%	20.2%
Crime or violence	40.8%	62.3%	32.0%	25.2%	26.1%
Long-term risks	Chile	Mexico	Denmark	Finland	Norway
<b>Top concern</b>	Secure finances in old age	Secure finances in old age	Secure finances in old age	Secure finances in old age	Secure finances in old age
Status and comfort (self)	34.4%	41.5%	31.0%	40.5%	34.7%
Status and comfort (children)	52.2%	54.8%	35.4%	34.3%	37.8%
Secure finances in old age	75.4%	70.8%	68.3%	66.7%	64.2%
Adequate housing	53.0%	53.6%	42.7%	54.4%	34.8%
Long-term elderly care	39.2%	32.8%	29.3%	34.3%	29.4%

Source: OECD 2018a

#### Short-term risks:

Regarding short-term concerns, the top concern in all three Nordic countries is becoming ill or disabled. In comparison, this matter is rated second in Chile and third in Mexico. Making ends meet is the top short-term concern in Chile, and is also indicated by more than every second respondent in Mexico. Here, however, crime or violence is an even greater concern. This is no coincidence, as the whole Latin American region stands out when it comes to citizen security. According to the UNDP (2013: iii), 'the region carries a heavy burden of violence, registering more than 100,000 homicides per year,' with homicide rates in many countries that the WHO characterizes as being on 'epidemic levels'. Being located in 'the only region in the world where lethal violence increased between 2000 and 2010' (ibid., 1), Mexico and

other countries in the region, including Brazil, still struggle with organized crime, mostly related to drug trafficking.

Across the five countries surveyed, short-term perceptions of risks related to adequate housing, long-term elderly care and childcare and education are the most similar. The latter appears to be of the least concern in all five countries. In relation to two risks, the Scandinavian countries of Denmark and Norway stand out from Finland as well as the two Latin American countries treated here. This concerns the perceived risk of losing a job, which is lower in the Scandinavian countries, and to some extent also the risk of not being able to make ends meet, in which perceptions in Finland resemble those in the Latin American countries more than those in Denmark.

*Long-term risks:*

The top long-term concern is 'secure finances in old age' in all five countries (and actually in all countries included in the survey). Finland stands out as the only country of these five where more people are concerned about their own long-term status and comfort than that of their children (however, the same is the case for approximately every second country in the OECD's survey). Of the five countries treated here, Chile stands out as the only country where the respondents report that their own status and comfort is what they worry the least about. In the survey data overall, Norway stands out as one of the countries where a large percentage of respondents indicate that none of these five surveyed risks concern them greatly, with 14% answering "none of these" (only the Netherlands has a higher such score).

Looking for patterns that appear to be different in the two Latin American countries and the three Nordic countries taken as wholes, we can observe that a greater percentage are concerned about secure finances in old age in Chile and Mexico than in their Nordic counterparts. Furthermore, respondents in Chile and Mexico are systematically more concerned about the status and comfort of their children. In the case of other risks, however, perceptions in Finland in some instances seem to resemble those in the two Latin American countries. Specifically, this concerns adequate housing, which seems to be as important a concern in Finland as in Chile

and Mexico, whereas it is less of a concern in Denmark and Norway. It also concerns long-term elderly care, which is more of a concern in Finland than it is in Mexico.

### **Conclusions: Challenges for human development in Latin America and the Nordic countries**

This article has provided an overview and analysis of human development, inequality and people's perception of social and economic risks in Latin America and the Nordic countries. While Nordic countries, known for their 'Nordic welfare model', rank consistently higher on the UN's Human Development Index (HDI) than the Latin American countries, the latter countries have over the last few decades made significant progress economically and with regard to health and education. This has resulted in substantially higher levels of human development than before as measured by HDI values for all countries in Latin America. Even so, inequality levels remain high throughout the region, thereby representing a serious obstacle to further human development in Latin American countries. This is evidenced in the UN's inequality-adjusted HDI data, among other sources, in which the contrast between Nordic and Latin American countries is even starker than in the regular HDI data, due to the comparatively low level of inequality in the Nordic region, and the consistently higher levels of inequality in the Latin American region. High levels of inequality translate to a poorer-than-average social welfare for significant portions of the populations in every Latin American country.

Actual living conditions are to a great extent reflected in what people perceive as social risks when looking ahead and thinking about their own prospects and those of their families. In this article, people's perception of social risks in selected Latin American and Nordic countries has been analysed based on data from the OECD's Cross-National Survey on Social and Economic Risks (OECD, 2018a). In this material, some quite obvious connections appear: People in countries with high poverty rates are more likely to worry about making ends meet, people with non-standard jobs are more likely to worry about future job loss, people in countries with high murder rates worry more about personal security and so on. As it happens, people's perception of social and economic risks largely reflect their actual living conditions. Improved and more equal living conditions in the future – which is what

we should aim for – are therefore likely to improve people’s satisfaction with life, and change what they are most concerned about.

However, some perceptions of social risks might be best understood in terms of cultural context or human psychology. Why, for instance, do so many worry about their financial security in old age, even in the most developed welfare states? Some concerns, it appears, never perish.<sup>4</sup>

The fight against inequality, and for social inclusion, are in my opinion necessary components of the fight for better lives for the entire population of the world’s countries. In few places is this more evident than in Latin America. Based on the analysis of this article, I conclude that the main challenges for human development in Latin American countries in the near future are related to working towards universal coverage of essential social services, and reducing inequality, particularly economic inequality.

According to the executive summary of World Inequality Report 2018 (Chancel et al., 2017b: 14), global income inequality will generally increase in the coming decades ‘if countries prolong the income inequality path they have been on since 1980 — even with relatively high income growth predictions in Africa, Latin America, and Asia in the coming three decades.’ In other words, while average incomes might rise, the difference between rich and poor in relative terms will increase.<sup>5</sup> Yet, with more progressive income inequality paths, such as the development in EU countries in the period from 1980 to 2016, the relative difference between rich and poor could decrease. Depending on whether recent US or EU income inequality paths are followed, the bottom 50% globally could have either 7% (US path) or 13% (EU path) of global income by 2050, and the top 1% either 19% (EU path) or 28% (US path) (ibid.). As a consequence, the average income for people in the bottom 50% of global

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<sup>4</sup> In a similar vein, there are a lot of complaints about the quality of health care and social services in Norway, despite their high international standing. In terms of human psychology, this might be explained by the tendency that improved public services have of further raising expectations.

<sup>5</sup> As of today, the top 1% globally earn about 20% of all income, whereas the bottom 50% earns about 10% of all income (in other words, on average people in the top 1% earn about 100 times as much as those in the bottom 50%).



income distribution in 2050 could be anything from 4,500 Euro to 9,100 Euro vs. 3,100 Euro today (ibid., p. 15).

As these different scenarios illustrate, economic policies make a huge difference in determining inequality trends. In Table 2, we saw that all the Nordic countries are currently significantly more equal in terms of income distribution than any Latin American country. By adopting policies aiming for Nordic-style income equality, Latin American countries would acquire considerably more economic resources to use to the benefit of the poorest parts of the population. Similarly, policies aiming at greater gender equality by income and other measures would help empower vulnerable single-parent households, as well as enabling women in two-parent households to live on more equal terms. In sum, this would lead to remarkable progress in human development for those who are today among the most vulnerable in Latin America.

The primary challenges for human development in the Nordic countries differ to some extent from those of Latin America. Rising inequality levels over the last 20 years or so will pose a threat to the Nordic welfare model if trends toward increasing inequality are intensified. However, while maintaining current inequality levels in the Nordic region might appear to be acceptable, that is not at all the case in Latin America. In place of inequality and expanded coverage of social services, the main challenges for human development in the Nordic countries could be to maintain current welfare schemes, and furthermore make them sustainable in the long run in terms of resource use. In an alarming assessment of current living conditions globally, O'Neill et al. (2018) conclude 'that no country meets basic needs for its citizens' – including a high level of life satisfaction – 'at a globally sustainable level of resource use.'

This points towards a common, truly global challenge for human development.

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