Chapter II

Review of Relevant Theories of Marriage
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2.1 Introduction

Several theories on marriage have been postulated from time to time by different schools of social sciences to explain why and under what circumstances an individual decides to marry and what factors influence the decision regarding when to marry as well as whom to marry. Theories of marriage have been developed under different settings suiting the cultural environment in which the parameters of marriage interact with the social factors. Marriage theories have evolved in the sociological context, from economic viewpoint as well as from demographic perspectives. As discussed earlier, the major dilemma most of the theories of marriage are trying to address is, whether marriages are getting delayed or forgone altogether. Even though the percentage of never married population is increasing over time, the majority eventually marry even now, albeit with certain delays in the timing of marriage. Hence the major alteration in the marriage market is happening through a movement towards delayed marriage rather than non-marriage. Theories have also been put forward to explain population composition and marriage formation. This theoretical perspective basically tries to explain the complex phenomenon of who should marry whom, given the sex composition in marriageable age group in the local marriage market. In this chapter the relevant theories and debates on marriage developed by different schools of thought are succinctly discussed.
2.2 Institutional Arguments

Marriage is, in most of the societies, viewed as a social institution and entry into marriage is seen as a response to social norms. While describing the institution of marriage and family in India, Kapadia (1966) described marriage as “a socially approved union of men and women aiming at ‘dharma’, procreation, sexual pleasure and observance of certain social obligations”. In almost all religions, marriage has been presented as a divine institution. The idea behind the traditional institution of marriage in Hinduism is to foster, not self-interest but love for the entire family. This in turn prevents break-ups in marriages. Marriages in India are neither about choice, nor about contracts. It is an arrangement made between families, providing very limited place for personal choice and freedom as well as a mandatory duty for the boy and girl. However, over time the personal factors are slowly making their way in the mate selection process in India and in many other countries where union formation was believed to be a responsibility of the family.

2.3 Economic Context

In contrast, economic models of marriage hovers around the female oriented argument developed in independence or trading and specialisation model, as formulated by new home economic theories (Becker, 1973). Borrowing ideas from international trade literature, he views single man and single woman as trading partners who choose to marry only when both partners believe that they will be better off if they marry rather than remaining single. Economic theories argue on the basis of a typical utility-maximising model of marriage where an individual’s utility from being single depends on the individual’s earned income if single, other incomes and individual characteristics, such as education and race. On the other hand, an individual’s utility
from being married, depends on the individual’s earned income if married, the spouse’s income, other incomes and individual characteristics. Marriage has been viewed as a rational arrangement between individuals who would be more productive as a joint economic unit than they would be if they remained single (Becker, 1973).

According to Becker, everything else held constant, the major benefit of marriage lies in the mutual dependency of both partners that arises from the gendered division of labour between spouses. The tendencies for men to specialize in market work and for women to concentrate on household activities make marriage desirable because the trading of different skills is beneficial to both partners. But with the process of development, however, rising female education and labour force participation precipitate reduction in sex specialization and make women less dependent on men. As a result, women’s economic gains from marriage decrease, rendering it less desirable. To put it in Becker’s words, “the gain from marriage is reduced… by higher earnings and labour force participation of married women, because the sexual division of labour within households become less advantageous”. Hence the specific prediction from this perspective is that a good labour market position is most likely to increase marriage among men but reduce marriage among women, again all else held constant. Thus according to Becker, with increasing female independence, marriage will be forgone and the proportion of never married females in the population will increase.

Although this theoretical prescription has enjoyed considerable popularity, its empirical validity has been questioned recently (Oppenheimer, 1988, 1994, 1997) and Oppenheimer et al (1995). There is only limited empirical evidence that has typically endorsed that better education and labour-market opportunities for women are negatively associated with marriage rates (Blau et al, 2000, Wood, 1995). A number of studies from both developed societies and Latin America find very weak support for
female independence hypothesis. Majority of the previous studies focused primarily on three key indicators to describe the labour market position of females. These three are educational attainment, employment status and earnings of the individual. Using different analytical approaches, these studies have come to a wide range of varied conclusions, Studies that took an aggregate level approach, examining the proportion of married individuals in a particular area support Becker’s hypothesis (Preston et al., 1975; White, 1981; Cready et al., 1991; Lichter et al, 1991). However these aggregate level studies have been criticised on the ground that, factors that produce aggregate level variation in marriage may not work in the same manner to explain marriage behaviour among individuals (Oppenheimer, 1997).

On the other hand, individual level analysis of longitudinal data generally found no relation or positive relation between various indicators of women’s economic prospect and marriage formation. For example, micro-level regression analysis, taking school enrolment into account, found that educated women have higher rather than lower propensity to marry. In addition to that, most micro level analyses find that women’s employment and earnings have either no significant effect or usually, a positive effect on marriage formation (Cherlin, 1980; Waite et al., 1981; Goldscheider et al., 1986; Lichter et al., 1992; Oppenheimer et al., 1995; Thornton et al., 1995;). Oppenheimer and Lew (1995) found that the only significant effect of the white women’s occupation on marriage formation was the negative effect of having an unskilled job compared to having a white collar job.

Studies that adopted a cross-sectional approach also faced certain limitation as it is difficult to identify the correct causal ordering of variables. Hence such studies end up controlling only limited number of characteristics relevant to marriage formation resulting in biased estimates of coefficients. Two recent studies using cross-sectional
analysis (Qian et al., 1993; Goldstein et al., 2001) have found higher propensity to marry among well educated women. The study conducted by Goldstein et al., (2001) among the women of the United States clearly predicts that female economic independence is not leading women to buy out of marriage. In fact, levels of marriage will be highest for those women who are, in theory, capable enough to live alone, that is, most highly educated. However, these results are not inconsistent with a suggestion by Becker (1973) that, in combination with assortative pairing, higher productivity of women can increase the gains from marriage. In sum, there is little empirical support for the argument that women’s presumed greater economic independence is responsible for the substantial increase in non-marriage or delayed marriage. Hence, the impact of education and workforce participation of women on the marriage pattern appears to be far from simple.

There are some parallel arguments which can also alter the economic context of marriage. Sweeny (2002) observed that in many developed contexts the growth in income since 1960 war is greater for women compared to men. Even the proportion of women in the labour force started to increase substantially, more so among women who are white, married and who have young children (Sweeney, 2002). It has also been envisaged that gender role attitudes have also undergone changes with an increasing proportion of population holding an egalitarian sex-role attitudes, making combination of marriage and labour force participation feasible for women (Thornton et al., 1989).

Remarkable changes in the consumption pattern have also been identified as a prominent factor altering the economic foundation of marriage. As put forward by Bumpass (1990), “Economic need is a highly amorphous concept, always seeming to outstrip what we have”. Given the expectation of high standard of living and decline in male earning, the perceived necessity of a second income increases (Oppenheimer,
1997; Sweeney, 2002). Rising housing cost (Wetzel, 1995), higher economic cost of childrearing (England, 1999) may also make periodic or regular employment for wives an attractive option for the family’s wellbeing. Moreover, as argued by Oppenheimer (1997), specialisation may become a high risk strategy in a small, independent, nuclear family system as the temporary or permanent loss of the services of one spouse specialist can seriously jeopardize the welfare of both the children and the remaining spouse. On the other hand, two earner families can provide economic flexibility and backup over the family’s developmental cycle (Oppenheimer, 1997). Oppenheimer and Lew (1995) even argued that the expectation of a stable career for women may enable them to afford to marry a man who may be unlikely to become an excellent provider, but desirable in other respects.

2.4 Gendered Approach to the Economic Theories of Marriage

An alternative explanation of female independence hypothesis has been provided by Blossfeld (1995) from the parallel analysis of marriage trends in seven industrialised countries. The relationship between educational attainment and the risk of marriage for women was found to be insignificant or positive in societies which endorsed the egalitarian gender-role attitudes (Sweden, West Germany, Hungary and United States), weakly negative in societies with somewhat more asymmetric gender division of labour (France and Netherlands) and significantly negative only in the least gender egalitarian country of Italy in the study. These findings led Blossfeld (1995) to a clear-cut conclusion that the economic opportunities proxied by higher educational attainment are associated with a lower risk of marriage only in societies defined by sharply differentiated gender roles. These arguments have been found relevant in the Asian countries where the gender roles are highly unequal. In the context of Japan, one of the
fast growing economies characterised by highly gender-inegalitarian social set up, it is seen that women’s education (Raymo, 2003; Raymo et al., 2005) and earning (Ono, 2003) have negative effects on marriage formation. These findings are in line with the “female independence hypothesis”. In Japan, however, Raymo et al., (2005) observes that besides women’s economic independence, “female status hypergamy” (marrying up) plays a major role to explain the negative relationship. Female status hypergamy implies that women should marry men of higher socio-economic status than themselves. The same logic applies for men also where they prefer to marry women with lower socio-economic status than themselves (male status hypogamy). This attitude coupled with convergence in the educational attainment of men and women, has decreased the relative pool of potential partners for highly educated women and for less educated men. Examining the effect of the compositional changes in educational attainment of women on education-age specific marriage rates between 1980 and 1995, Raymo et al., (2005) argued that one-fourth of decline in marriage rate among university educated women is explained by the changes in the availability of potential spouses. Rapid expansion of women’s university education and women’s strong preference to marry men of higher socio-economic status than themselves are causing marriage squeeze against highly educated women leading to less marriages among them.

This indicates towards the fact that even if non-marriage among females increases with the improvement in their economic independence (may be proxied by educational attainment), it may not necessarily follow the causations as perceived in the “female independence hypothesis”. The broader contest of gender relations determines the dynamics in the marriage market.
2.5 Demographic Explanation

The demographic forces, fertility, mortality and migration can affect the marriage market by altering the sex composition in the marriageable group in the local marriage market. The fundamental question raised by this school of thoughts is whether there is an appropriate man for every woman. Initially an “appropriate” match was purely defined only in terms of age (Akers, 1967), which is a purely demographic variable. With the passage of time, it has been realised that besides age, there are many other characteristics such as race, religion, education, men’s economic attractiveness, family background (especially in case of arranged marriages) which play important role in forming assortative pairs.

The impact of demographic forces on marriage rate is usually measured by the sex ratios in the marriageable age groups and thus it is concerned about how marriage “squeezes” affect marriage timing and proportion ever marrying (Akers, 1967; Muhsam, 1974; Schoen 1983). Most of such work has been conducted at the aggregate level, in order to measure the extent of homogamy over time (Schoen et al, 1988; Qian et al., 1993). Sex ratios can have impact on the marriage market as men usually marry women of younger age. Hence in a growing population with a rising annual flow of births, there could still be an excess of women at marriageable ages because eligible men at older ages are drawn from smaller birth cohorts (Caldwell et al., 1983). In such a situation, females may marry earlier, and sometimes with less desirable mates owing to their weak bargaining power in the marriage market.

Nevertheless, Bhat et al., (1999) has described the pathways through which decline in mortality can affect the process of marriage squeeze. According to them, in most of the developing countries like India, the initial decline in mortality is concentrated largely
at the younger ages. The excess mortality reduction at the younger ages is making each forthcoming cohort larger compared to the preceding one. This is expected to alter the balance of sexes at marriageable ages and can bring about some form of ‘marriage squeeze’, essentially against females. They have identified one more channel through which mortality reduction may affect the supply condition, especially in the Indian marriage market. This channel has its origin in the decline in the adult mortality. Bhat et al., (1999) argued that given the mortality condition at the beginning of the twentieth century, widowers were one of the important players in the Indian marriage market. On the other hand, widows played less significant role as there was cultural taboos on widow remarriage. Consequently, a large proportion of widowers were taking never-married women as brides. With the decline in mortality since the 1920s, the joint survival of couples has shown significant improvement and as a corollary, the incidence of widowerhood has fallen. Consequently, according to Bhat et al. (1999), an important source of the supply of bridegrooms for single women was wiped out, especially for those in the lower-ranking in each caste and in lower economic categories. Therefore, many single women could not find men to marry, causing the postponement of marriage.

However, while discussing the impact of demographic forces on the marriage market, the other side of the event also has to be kept in mind. Fertility is clearly on the way down across the world. If the usual pattern of marrying younger women than men remains the same, then sooner or later there will be sheer lack of females in number as they will be taken from the smaller birth cohorts. On the top of this, fertility decline in India and many other Asian settings has moved hand in hand with acute son preference and consequently heavily distorted sex ratios in favour of males (Das Gupta, 2009; Guilmoto, 2012). This has resulted in too many males in the population which has
severely altered the sex ratio in the local marriage market (Kaur, 2004, 2012; Davin 2005, Lu, 2008; Chaudhry et al., 2011) and the market is becoming apparently favourable to females. In such a situation, one possibility is that, females may wait longer to choose a better mate and males may need to invest more to improve their achieved status in order to attract desirable mates. However, there is an ongoing debate whether scarcity of women in the marriage market is really beneficial for the society in general (Hudson et al., 2002; Li, 2010; South et al., 2010, 2012; Zhou, 2011; Sharygin et al., 2013) and for females in particular (South et al., 1988; Kaur, 2004,2010;Zhang, 2010). Studies also highlight that increasing sex ratio may lead to increasing violence against women (Oldenburg, 1992; Dreze et al., 2000; Chowdhry, 2012) and may affect adversely the broader question of gender equality in marriage (Hudson, 2002; Kaur, 2010, 2012; Larsen et al., 2013).

Migration is another demographic factor which can alter the sex ratio in the local marriage market to a great extent mainly via its potential connection to labour market. Usually the decisions on career choice and marriage happen together in the life cycle events. It generally happens that expansion of urban activities draws a disproportionately larger number of males from village areas. As identified by Stark (1988), it may result in a lower supply price of brides or more break-ups in marriage. However, he also mentioned that since this is a typical local marriage market phenomenon, it can be corrected through migration of females in the city in search of brides.

Nevertheless, borrowing the ideas from literature on “feminisation of migration trend” following the globalisation process (Hugo, 2005; Yamanaka, 2005), it can be asserted that in the recent flow of migrants, females from developing Asian countries constitute a major chunk. They usually migrate to developed countries in search of work. Even
within the country limit, in Japan and South Korea, women are migrating to the city for work and marry there eventually (Knight, 1995; Constable, 2005). This has created a serious problem for rural men, especially with lower social and financial capital. They find it extremely difficult to find suitable wives in the local marriage market (Suzuki, 2005; Lee, 2006, Tseng, 2010). This group of men initially stared to opt for “foreign brides” making the way for a body of research focusing on cross-border marriage migration. Moreover, the sexual imbalance characterising many of the Asian local marriage markets has given impetus to the trend of transitional, cross-cultural, long-distance marriages in the Asian countries.

In India, the most prominent reason for migration of females is cited as marriage. In 2001, out of 65 million female migrants, 42 million reported marriage as the reason for migration. Given the norm of village exogamy, especially in the northern parts of India, long distance marriages are not very uncommon. However, a branch of marriage research involving cross region marriages has emerged in the recent demographic literature mainly following the changes in sex ratios (Kaur, 2004; 2012) resulting in willingness to compromise on strict rules of caste endogamy and gotra (clan) exogamy (Larsen, 2013, Mishra, 2013) in the local marriage market. In many Indian states, especially in the northern and north-western parts of the country, sex ratio is historically skewed in favour of males. Relatively lesser number of girls in the local marriage market has resulted in acute shortage of brides. Hence unmarried males from these regions resort to import brides from poorer regions or from other nations like Bangladesh and Nepal (Kaur, 2012). It has also been seen that states supplying brides are impoverished, having preponderance of daughters in many families and poor parents are unable to pay dowry (Kaur, 2004).
2.6 Sociological approach

Sociological literature on marriage is mainly concerned with the social heterogeneity especially how a small group relative to the total population might affect intergroup contacts. According to the existing literature in this body of research, group size is critical rather than the imbalances in the number of women and men in the marriage market. Even with a perfect balance between the sexes, members of a group still may face difficulties in marrying assortatively if there are fewer potential mates with a given feature per se. People may prefer to marry certain kinds of mates and may not just simply accept the most common type available within the group (Lewis et al., 2000). Evidence shows that this idea is true for smaller educational groups where people instead of marrying down on education within the group, out marry frequently or delays the marriage in order to match the rare but desired feature of educational homogamy (Blau et al., 1982). Hence this is not merely a product of mathematical figures.

Blau et al. (1982) believe that smaller the group size, higher will be the probability of more out group contacts. Members may out marry frequently if the group of similar potential mates is relatively small and if the groups of dissimilar potential mates are large.

Although both demographic theories based on sex ratio and sociological literature link market condition with marriage formation, they differ substantially. Unlike the sex ratio approach, the later highlights the relative group size rather than imbalances in the number of men and women. Hence it is clear from the sociological prescription that marriage market concentration can affect marriage formation by altering people’s marriage timing. Depending on how unfavourable their market is, people may be able to delay marrying to find a partner who matches their preferences the best.
2.7 Search Theory

There is another perspective relating population composition to marriage, adapted from economic job search theory by Oppenheimer (1988). It focuses on how the distribution of potential mates affects the relationship between times spent on searching for a partner and the type of match ultimately achieved. Search theory connects marriage timing and sorting to each other and to market composition. The nature of the relationship between timing and sorting depends on the costs and benefits of search. Costs include direct costs such as the expense, time, emotional risks, as well as opportunity costs of foregoing possible matches to continue searching. Benefit takes the form of achieving a higher quality match. Costs and benefit in turn depend on factors including individuals’ marriage market capital (such as education, income etc.) and the distribution of potential mates.

Moreover, conditions of search vary across persons and places. For some, there are many well-matched potential mates which ensure high benefits for searching. These persons can find mates quickly despite being selective. Others have fewer well-matched potential mates (and lower search benefits). They can also find mates quickly only if they are less selective. Again, some live in markets where many potential partners are well-matched, and can therefore improve their sorting opportunities through extended search. Others live in markets where few potential partners are well-matched. Therefore they can expect little benefit from extended search.

The conditions of search shift over the life course also. For example, one’s marriage market capital changes with age. Income and social skill usually increase, but fecundity, charm and adaptability may decrease. The ability to bargain for a potential match can decline if the latter features are given more importance. Secondly, potential mates
marry off, leaving a thinning market. This increasing sparseness in the pool of potential mates can limit peoples’ ability to sort on any feature.

2.8 Theories Related to Dowry

Dowry seems inevitable in marriage in many South Asian societies in general and India in particular. It has enough potential to decide the formation, timing and even the quality of the marriages in most of the South Asian countries. Dowry gained importance in Indian marriages during the 19th century among upper castes of Bengal who were keen to get English-educated men in government services (Risley, 1915). Slowly the evil spread to the entire northern belt. In south India initially it started with the urban, educated, upper caste group and diffused rapidly in rural areas and among lower castes and religious minorities like Christians and Muslims (Caldwell et. al., 1983; Rao, 1993).

The rationale behind discussing this branch of marriage transactions in the present work is that, escalation of dowry in many South Asian countries is somehow propelled by the demographic transition process which is relatively a less explored area in demographic research (Bhat et al., 1999). Demographic transition, in combination with the strong preference for early, universal and monogamous marriage in India resulted in heightened competition for eligible grooms in the Indian marriage market. As rightly pointed out by Rao (1993), in South Asia, population started growing during the 1930s, and members of the cohort born then would be of marriageable age by the 1950s. As there was a marriage squeeze against females during the initial phase of demographic transition, a clearly observable trend of rise in dowries is realized from 1950 onwards.

Since the turn of 19th century, the real value of transfers from brides and their families to grooms and their families has increased widely in South Asia (Lindenbaum, 1981; Billig, 1992). Many communities in India have been switching from a bride price to a
dowry system and among those who were already practicing it historically, the amount of dowry demanded has increased by leaps and bounds (Rao, 1993; Bhat et al., 1999). Research reveal that the net value of goods and services transferred at the marriage of daughter is a considerable share of almost two-thirds of the total assets of the household (Rao, 1993) and higher the position of the groom’s family in the social ladder, higher will be the amount of dowry (Billig, 1992). Dowry is one of the prime factors which can explain the trend of acute son preference and the intensification of gender bias with increasing education and modernization (Dasgupta et al., 1997) in the entire South Asian belt.

There are some explanations in the existing body of literature on dowry about why the amount of dowry demanded is becoming skyrocketing. The first argument in this line started with Boserup (1970) who viewed dowry as compensation to the groom’s household for accepting an ‘unproductive’ member. She found that female farming systems are usually associated with polygyny and bride price while male farming systems are characterised by monogamy and dowry.

Considering this as the point of initiation, some authors argue that the dowry switch in South Asia occurred because the process of development diminished the economic role of women and the rates of labour force participation (Epstein, 1973; Rajaraman, 1983). Research shows that, employment opportunities in rural India has been affected in a negative manner through a series of development initiatives; mechanisation of agriculture and introduction of labour saving technologies, changes in cropping pattern, development of market economy, shift of men towards urban based occupation, to name a few.
However, census and survey evidences have not yet supported the argument of declining workforce participation (Randeria et al., 1984). Moreover, in-depth inquiries sometimes suggest that rather than declining workforce fuelling the dowry spiral, parents could be paying higher groom prices because they desire to marry their daughters in families where they do not have to perform manual labour (Caldwell et al., 1983). Evidence also shows that the higher the wealth of a groom’s parental household, higher will be the amount of dowry demanded. Hence declining female earning can explain this trend only partially.

According to another school of thought, dowry payment is attributed to the transfer of wealth for the daughter at the time of marriage. This may explain the phenomenal increase in dowry payments among middle and upper classes where the bride is expected to have ownership to a part of the dowry. However, in order to explain the universality of dowry payments across all castes and creed, social anthropologists argued mainly on the basis of “Sanskritization”. This is a term used by Srinivas (1956; 1972) to explain the adoption of upper-caste patterns of behaviours by members of lower castes as a means of acquiring higher social status. Since dowries have traditionally been the common marriage transaction of the highest (Brahmin) caste, Sanskritization explains the observed shift in regime from bride price to dowry in all the other castes as upwardly mobile imitative behaviour. This explanation is weak on two grounds. First, it is hard to believe that the benefit gained by lower castes in behaving like Brahmins is greater than the immense destitution they often face by paying dowries. Secondly, real dowry payments have gone up even in castes in which historically dowries have been paid. So the problem is not merely the switching from bride price to dowry, but more general one of an upward shift in the relative price of husbands.
Another perspective on dowry holds that it is the product of competition among women to attract resourceful men. This model seems particularly important in the context of Indian marriage market. A marriage alliance has been conventionally viewed as a means of ensuring a better future for the daughter, as well as an avenue for enhancing one’s own prestige in the community (Dumont, 1970). Social change in modern India has created small groups of educated elites in almost every caste and community. Marriages being hypergamous in India, has generated intense competition among bride givers to catch hold of grooms from this section of elites. The qualities of a bridegroom are judged not only on the basis of his ascribed status (such as membership of a clan) but also on his achieved status (such as education, occupation, income, etc.). In this context, the groom price is seen by everyone as an obligatory investment in a daughter’s future and a means of achieving social mobility (Bhat et al., 1999). However, recent literature shows that, following the demographic imbalance in the marriage market (too many males and very few females in the marriageable age group), in the north western states of India, dowry demand is going down (Kaur, 2004, 2012).

2.9 Summary

To sum up the theoretical arguments, it can be stated that delayed marriage is emerging as the most crucial characteristic in both developed and developing countries. But the context of the changes in the marriage pattern varies widely from one setting to another, especially in the developing context. Somewhere economic development preceded the transition towards delayed marriage whereas in some cases marriage has been delayed substantially even though the pace of economic development is not remarkable. Sri Lanka and the Indian state of Kerala are the particular examples for this.
So far from the review, it has been made clear that higher age at marriage is not necessarily the outcome of emancipation of women, as has been argued under the SDT regime as well as by the independence hypothesis. Gender roles have a major role to play in determining the timing of marriage. If gender roles are highly inegalitarian, then females may delay or in some cases forego marriage as marriage in this context means an obvious drop out from the labour force or an acceptance of a burdensome “second shift”. In such contexts, female independence hypothesis may still find its relevance.

Then comes the composition of potential partners in the local marriage market which is affected by economic, sociological and demographic forces operating in a particular society. Given the economic stringency in most of the developing countries as well as the high unemployment rate, marriage of females get delayed may be because of the scarcity of “eligible” marriageable men or dearth of resources in the girls’ family to attract “eligible” grooms. In countries like India, the system of caste hierarchy and religious differences are making the cohort of marriageable men further smaller. Moreover, the practice of hypergamy is also creating bottlenecks in finding proper matches in the local marriage market. Convergence of education among males and females is making the pool of potential partners smaller for the highly educated females, leading to delayed marriage and even non-marriage among them in the Asian societies. Hence, there are many more factors which are governing the trend towards delayed marriage in the developing countries seeking a fresh and careful approach, though that may not be necessarily in line with the experience of the developed countries.