

Dan SANDU
Editor

**European Societies in Transition.
Social Development and Social Work**

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Dan Sandu
Editor

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PREFACE

Involvement in the social life of our fellow human beings in the current context ceases to be the exclusive remit of specialised secular institutions and increasingly becomes an issue of public responsibility that all members of society must be committed to, from transnational institutions to the individual person who cannot and must not disregard the community.

Leading the way in this field are the institutions which provide higher education or vocational training in the domain of social sciences and community service. Such educational bodies can design policies, provide specialist assessment of social problems and propose methods to solve them. The International Consortium for Social Development, the European branch, brings experts together and challenges them to maintain constant dialogue through biennial conferences, organised in various European countries. The priority of such conferences is to ensure that the debates are relevant to the local context and also constitute the ferment for subsequent meaningful action.

The 11th biennial conference of the ICSD took place in Iasi, a leading higher education centre in Romania. The city of Iasi is a cradle of culture and the arts, but equally a place where social outreach and human solidarity, on religious or historic grounds, have been given a pioneering perspective. From a geographical viewpoint, Iași is one of the most eastern academic centres of the European Union. From the perspective of political and social challenges, it is in the midst of profound ongoing change, which is locally referred to as “the transition period”. The state of transition seems to have become the norm after the end of the communist regime, a sort of never-ending process with which the local community has become acquainted as a way of life.

For some, transition in Romania is a negative process, making the transfer from a uniform and stable social system to an unsafe and demanding system, with a predisposition towards unregulated economic competitiveness and a dog-eat-dog social model. Such philosophy provides support for reluctance towards change, regret for the past, and the absence of communal responsibility. One can still notice cases of

people or groups of people who take state assistance for granted, with little awareness of responsible engagement or self-support.

For others, the transition is largely beneficial, as it represents the positive, natural process of passing from a system of censorship and control to social involvement where the liberty and dignity of the person come first. The Church, a social institution by definition, is perfectly integrated in such a process, as the tenets of its doctrine uphold the values of peace, understanding, diligence, generosity, solidarity, and empathy. This is the reason why theology as an academic science nowadays provides specialisation in social assistance; this is why there are numerous projects, structural programmes and parish community initiatives in the service of disadvantaged and vulnerable groups at risk of exclusion.

The contributions collected in this volume are intended to be useful in the Eastern European social context and especially to those who experienced the communist rule. Whereas in the old regime the social disciplines had been eliminated from the academic curricula, now they are widely taught, to restore what was lost in the period of exclusion in terms of theoretical qualifications and practical action. However, the Eastern European societies have been caught rather unprepared for such developments: the transition is fast-paced; sometimes individuals or groups oppose it or refuse to be involved; rules are firm and imposed according to already established models in the Western European countries. Society tends to become more ferocious in content but more accessible through media and democratic liberties. From the economic and politic viewpoint, change is very swift. From the social and religious point of view changes must be slower and need greater attention because of the fundamental and structural nature of these transformations.

Given the ongoing multidirectional crisis at both local and global level, it becomes imperative to take firm action. From the Eastern Orthodox perspective, where faith still has an important role to play, I would like to use Prof. Gheorghe Popa's proposals to counterbalance the effects of the crisis, based on the teachings of the Church Fathers:

a) To the moral and spiritual crisis manifested today in the religion-free society one must respond with the holiness of life and the communion with God and with fellow humans.

One should mention the fact that religion-free society does not stand for atheism. It refers in particular to the difficulty in accepting the

presence of God in everyone's life and in understanding the necessity of a dialogue with Him. The patristic theological reflection states that secularisation starts with the decay of the state of communication with God and with the others.

b) To the individualism, narcissism and self-sufficiency of the global society one must respond by intensifying the spiritual life in local communities. One should notice that the secularised society is profoundly egotistical, selfish and self-contained. The extreme individualism of the secularised human being is expressed by the feeling of loneliness and abandon or by the unremitting search for things which annihilate any feeling of transcendence: drugs, power, wealth and pleasure.

c) To the present ecological crisis we must respond by asserting the fact that the world we live in and the creation in its entirety are "sacraments" of the communion with God and with the others and not just simple "objects" liable to technological manipulation.

The severe ecological crisis, mainly due to the irrational exploitation of the resources of the planet and to the manipulation of nature through biotechnological experiments can be counterbalanced by restraint, the sense of asceticism and rationality in using resources and by genuine commitment to the continuity of life on earth through the generations to come. The Church Fathers stated repeatedly that the world was created to be a "sacrament" and a mystical horizon of communication among people fully accountable to the Creator.

d) To the economical and social crisis one can respond by emphasizing the dignity of every single person, created in God's image.

The rapid progress of biotechnology and the extraordinary development of means of mass communication lead today to major and unpredictable mutations with significant consequences on people's lives. The advances in the fields of medicine and genetic research generate, of course, much hope, but at the same time give rise to many ethical dilemmas concerning human dignity. Globalization, as a specific process of the post-modern world, built on standardisation and levelling and supported by the development in computer-based technologies, must be approached with care so that the global economic development does not become a totalitarian ideology where the individual's dignity and the dignity of the various peoples and cultures are sacrificed on the altar of material profit.

Let me conclude with a little story about the changes in the New World, which seem to have been similar to what is now happening in Eastern Europe. Several Indian tribal chiefs, who normally travelled on horseback, were introduced to travelling by train with 50km/h. On descending they were told: “Now, back on your horses”, but they replied: “No! Not yet! We must wait for our souls to come, too!”

The protracted transition and the financial and economic crisis have a devastating effect especially on vulnerable people who depend on community action and social involvement. In the rush toward progress and amassing wealth, faith communities must make their voices heard, because what matters above all is the human person in its wholeness, who is destined for the life eternal.

Dan Sandu, Ph.D.

Iași, 2009

PART I

STRATEGIES, MODELS AND VALUES IN SOCIAL AND COMMUNITY WORK

LEVELS OF WORK METHODS OF WORK ETHICAL ROOTS CROSSING BORDERS 'GLOBALIZATION' IS MISLEADING

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Abstract:

The autor reminds us of the four levels of social work intervention: face-to-face communication; group interaction; community organization and social development; social policy. He mentions different ethical roots underlining social work in the tradition of different European countries and societies. He describes different modes of 'transition' from one situation (and one method of social work) to another, using his own professional development as example. He warns, not to misunderstand the catch-word 'globalization' as plea for global unification. On the contrary: indigenous traditions should be respected and further developed to meet specific target groups and problems in different countries.

Keywords: social care, policies, globalisation, social development, ethics

1. Introduction

Within the last century Europe has seen and suffered from at least four major transformations: After World War No. One, World War No. Two, the end of the Cold War and the dissolution of socialism and socialist mastery after 1990.

But not only Europe, large parts of the globe are going to be affected and transformed by the internationality and globality of

economic, political, cultural and social processes. Most of us have the impression that we are no longer masters of those processes but objects and may be even victims. We try hard to soften some of the consequences of this transformation and to master it in the end.

2. The four levels of Social Work

As we all know Social Work is performed at four different levels of social interaction:

- the level of face-to-face-communication between helper and client as a problem solving process;
- the level of small group interaction in order to qualify groups of people to work successfully for an identified common aim;
- the level of community organization and development in order to built up or to re-construct infrastructure and resources of a given community, be it parochial, political, social or just geographical;
- the level of social policy-making in order to take care of existing social problems in general and to promote permanent helps for the needy, possibilities for the young, invitation and inclusion for those who knock at our doors and who have something to offer. And to take care of the application of human equality and human rights to all of us. It is now 15 years ago that we proudly call ourselves a 'Human Rights Profession`.

The four levels of Social Work activities are the result of a process of professional development more than one hundred years long. Not all four levels were developed at the same time. In my country - Germany - it started with social case work as a face-to-face helping process practiced by members of the women`s movement and professionalized by Alice Salomon and Siddy Wronsky (1910-1930).

Group work as a self-helping and self-educating process was an achievement of the outonomous youth movement between 1904 and 1930.

Community organization and development was a gift from North-America, Great Britain and the Netherlands between 1970 and 1980. And social policy as a necessity to soother exploitation of workers and the class struggle was installed both by Social Democrats and Reform Capitalists between 1870 and 1930. Later on social policy had a second prime time with Chancellor Willy Brandt (1970-1980).

3. Three phases in Social Work education

Some different disciplines of human and social sciences are involved in the teaching of professional Social Work. In my country I mention especially psychology, sociology, education, law and administration and political science. In the last century we put different accent on different parts of these disciplines. At the very beginning we relied very strongly on individual psychology, social psychology and psycho-analysis. During the 60th and 70th we switched (in the western part of Germany) to a critical theory of society and socio-economical aspects of Social Work. We thought it could be possible to socialize all risks and costs of the reproduction of human labour and the education of the young generation. In the eastern part of my country both functions we part of the unified system of education and qualification. A special system of Social Work was not regarded to be necessary.

Nowadays we have switched to the so called 'meso-level' - the medium level of Social Work intervention. This means working with local people, boards and institutions, with different actors, opinion leaders and non-governmental organizations. As it seems to be impossible to reshape and reform the whole of society in this transition period we try to mobilize local resources, local manpower and local economy. Susanne Elsen from Munic, who is a well known member of your board, is an outstanding European expert especially in this field.

4. Ethical roots of Social Work

Social Work ist not just another activity to care physically for the hungry, the needy, the forgotten. It rests on strong ethical traditions in our different countries. It resta on theories of philosophical, theological, human and socialist origin.

All religions which we know demand their believes to love and care for their fellow-believers as if they were brothers and sisters of their own family.

'Charity` is an ever-lasting command of any religious society or confession.

Another tradition roots in the humanistic movements between the 15th and 19th century all over Europe, which tried to re-discover and revitalize the ancient ideas of freedom, equality and brotherhood of all women and men all over the world.

Not 'charity' but 'active love to all mankind' was the key word of these humanistic movement.

A third tradition has something to do with the ideas of Marx and Enbels (between 1848 and 1890). They had the vision that a new society of free and equal citizens, full of empathy and love for each other could be the result of an united 'working class' which shows and exercises 'solidarity' with those fellow-workers who are in the same situation all over the world and who show the same activity to change their situation collectively.

This means: 'Charity', 'active love to all mankind' and 'solidarity with those in the same situation all over the world' are three keywords to describe the ethical background of International Social Work over time and space.

5. Social Work is something to DO

Social Work, social education and social development is something to DO with your hands, your heart and your head. With the Harald Swedner Award 2008 you remember and remind others of a pioneer in the field of social development who as a brilliant scholar of sociology felt a strong notion to transform his scientific knowledge into practice. To fight social injustice and economic exclusion in Scandinavia and all over the world was the primary motivation for his research, his teaching and for the multitude of action research programmes he brought underway.

When I read Harald Swedners life story I feel quite at home with my own fifty years of practice and research, of writing and teaching Community Organization and social action in Berlin and other parts of Europe. During these fifty years of professional life I went through three periods of transition in my own professional orientation. May be it could be helpful to reconstruct them in this International Conference on 'European Societies in Transition'.

6. My own periods of 'transition'

I was born in 1928 in Dresden/Saxonia into a traditional Social Democratic family, that means with a firm anti-fascist background. Journalism, education and politics were the three main areas of my professional interest. I studied European arts and culture, I worked as a journalist and I became by chance youth worker and group worker in Berlin. I knew political youth life and group work in the shape of Nazi-

Organizations. And I had to re-learn what a democratic youth group was, how kids interact in such a group, which values were persistent, which kinds of activities prevailed and how it was decided upon in the group, how re-orientation from the formal 'leader' of the group to an autonomous team of cooperating members of the group could be established and qualified. And that belonging to one group was not a lifelong task without any 'escapade' but a terminable phase of individual development which could be ended without unscrupulousness.

To learn all this I had to do away my old and unloved group experiences in authoritarian youth organizations and had to study (for instance) the famous leadership-style-research-project of Kurt Lewin (1937) and to contact Gisela Konopka in the University of Minnesota in Minneapolis, to learn what 'social group work' was at that time (1965) in the USA. I am proud of this *first transition period* of my professional development.

As 'Harkness Fellow' I also studied community organization and social action with Harry Specht in Berkeley/California along the line of 'aggressive community organization and social action' in the footprints of Saul Alinsky (USA) and Danilo Dolci (Italy). This shift from group work to community organization was my *transition period number two*: the shift from the small group to larger and more complex communities which larger facilities and power to develop their resources and to define the circumstances for their own development. This was for me a step-by-step strategy on the long road to a better, a more human, a more caring society. The 'caring family' was supplemented by a 'caring community'.

This 'step-by-step idea' ended for me in the last decade of the century behind us. I had to learn that social development does not necessarily mean moving upward and gaining the future but sometimes also moving downward and renewing the past. To arrange with this new situation with new perspectives and new concepts of development was my *third transition period*. I learn that Social Work is bound to social, political and international circumstances which could open or close the doors to a society with more charity, more freedom, more self determination, more solidarity. Here I am. Here we are.

7. Two sides of the profession: Scientist, Craftsman/craftswoman and Educator

Social Work and social development have a threefold orientation: Workers who engage in this profession should have

- the scientific competence to *furnish a diagnosis* of the problems they are working with;

- to develop individual, partner-oriented or collective plans, how to work with those problems and how to perceive, that progress in doing so is achieved; and

- how to foster the helping process by teaching clients, groups and communities to pursue the helping process for themselves and by themselves without further help from outside or to establish a permanent helping network with adequate and willing partners in the community.

This is a combination of analysing- and intervening- also moderating - competence, a combination between a scientist, a craftsman and an educator.

8. Globalization does not mean equalization

Taking part in international conferences - of the International Federation of Social Work, the International Association of Schools of Social Work and the International Consortium for Social Development f. e. - I very often hear this statement:

We are living in one world. All our problems are going to be 'globalized'. We should think, we should analyse, we should act as a unified profession.

I doubt this statement. Shurely our key concern is in agreement with Christian, humanistic and even socialist principles and commandments. But our working situation, the problems we are going to work at, the resources we can take into consideration, the target groups of our work and the political situation - they all are very, very different. To underline this statement I may quote one of the latest publications on 'International Social Work':

"Direct social work practice varies from society to society, depending on cultural variables such as politics, the economy, culture, and religion. Social work practice in countries where a social security systems is in place will vary significantly from countries with limited government-funded social security ... Moreover, the notion of what is social work will vary from society to society" (Borrmann et als.

International Social Work. Social Problems, Cultural Issues and Social Work Education. Farmington Hills: Barbara Budrich: 2007, p. 9-14).

The structuralistic idea of a globalized situation all over the world may be understandable for economists and marketing experts, who are looking for the unification of markets for goods and services under standardized conditions. It may be understandable for internationally operating companies which take advantage of qualified but cheap manpower in so-called 'developing countries'. For Social Work the idea of 'globalization' is as silly as the outmoded concepts of both the United States of America and the old Soviet Union, to export their ideological assumptions to the rest of the world - hiding their economic and political interests in the background.

On our continent we are faced with a history hundreds of years old. We are faced with traditions and indigenous solutions of social problems which are deeply rooted in our collective memory and our individual practice. We should respect them and develop them into the future. Transition of people, of countries, of societies means to cross borders which divide the future from the past. Our future was very very different. So are the problems we face in our respective transition movements. We will learn from each other. We should assist and help each other. My concept of international solidarity has nothing to do with unification. But this solidarity may be helpful for all of us.

SOCIAL WELFARE - AN UNEXPLOITED RESOURCE AT THE DISPOSAL OF PUBLIC SOCIAL POLICY IN POLAND

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Abstract:

As a result of population ageing, transformations of women's employment patterns the demand for long term care services increases in Poland. The limited supply of care proves that social services is not an instrument of integration and indicates commodification of social policy through the growth of pressure on cost lowering in conditions of market competition, transfer of cost bearing on end-users and development of commercial ethos. There are a number of main trends and evolutions of social services in long term care sector in Poland: decreasing participation of families in long term care of their members, deinstitutionalization of public long term care with a shift of care from residential homes to home care services, expansion of long term care provided by unpublic services and decentralization of long term care social services. There are spatial and economic factors that determine access to care services provision for different income groups of users. In urban areas with a bigger number of middle class ageing population there is growing demand for high quality care services provision from private sector while in poor rural areas the only provider and employer for labour force seems to be public sector and voluntary workers from charity organizations. Community care organized by local statutory sector with the use of unemployed and excluded women from rural areas seems to be a good solution as an arrangement for organizing care services for the old people in rural areas. The presentation will be based on results of research Diagnosis of socio-economic situation of women in rural areas of Poland that has been just completed for the Ministry of Labour and Social Policy in Poland and on participation of its author in two comparative studies: organized by European Foundation for Improving of Living and Working Conditions (Dublin) and Observatory of Social Services (Frankfurt and Vienna).

Keywords: social inclusion, social participation, rural women, the old people

1. A specific character of the development process of social welfare in Poland

The stages in the formation process of a new system after 1989

Social welfare constitutes an institution of social policy of a welfare state which enables individuals and groups of people to cope with difficult life situations by means of material benefits and social work. Social welfare developed as an element of socio-economic and cultural order of the industrial society which supplemented or replaced family support systems and the activities carried out by religious and secular charities. The development of social welfare in Poland was marked by the dominance of non-public institutions, predominantly related to the Church. Whereas in Protestant countries, due to Reformation, religious social welfare institutions were replaced by a public system, in Poland the victory of Counter-Reformation and the partitions reinforced the dominance of the Roman Catholic Church. Poland's lack of statehood resulted in the emergence of a different model of the occupational role of a social worker as this role was played by a patriot, an amateur community worker, a priest or a lay member of the Church or another religious community who acts for patriotic and religious reasons. This specific context delayed the process of professionalization of social work regarded as an occupation endowed with public trust and influenced the theory of aid activities. It can be traced in the thought of Helena Radlińska who lay the foundations for social pedagogy which is the Polish version of social work. The institutionalization of social welfare took place only after Poland regained independence in 1918 but a short process of establishing a public system was disrupted by the World War II and the introduction of a new political system in 1945. In the People's Republic of Poland social welfare became a marginal institution in the social security system. Due to the nationalization and centralization of social welfare in this new political system, the tradition of welfare society and its institutions were abandoned. Foundations and associations were made illegal, the local government was abolished and due to the fact that there were no statutory regulations the occupation of a social worker was deprofessionalized.

The formation process of the social welfare system after 1989 was based on the idea of decentralization of the state and the revival of local

self-governance. Two public administration reforms of the year 1990 and 1999 were crucial for forming a new institution¹. The legislative work on the bills concerning social welfare and the local government (1990) resulted in establishing an institution with a new partially decentralized organization structure. Communal social welfare centres assumed the role of a local partner of central and regional state institutions. Central government agencies took on the function consisting in organizing social welfare as well as scheduling, regulating and controlling functions whereas local government bodies provided services in the place of residence. The dual character of targets set for social welfare became a major problem, which was reflected in the division of tasks carried out by social welfare centres. The performance of communes' own statutory tasks was financed from the local government funds and in the case of delegated tasks, financial resources came from the central budget. The subjectivity of the commune with regard to social policy and social welfare was limited to a narrow area defined by statutory tasks, and delegated tasks financed by the state reduced the role played by the local government's social welfare to an instrument of social support for the victims of the systemic transformation, that is to managing and supervising social problems at the local level. Local social welfare provided within the closest environment fulfilled short-term goals of interventional nature directed at new groups in need but at the same time it constituted a vital element of the policy of transformation of the whole social security system in Poland. The activities were aimed at changing common programmes into selective ones which would be available only for the people who meet particular income-related criteria. This resulted in transferring the benefits which used to be universal from social insurance and social security to social welfare. The increase in the number of social welfare beneficiaries and in the range of tasks assigned to social welfare and the limited amount of resources made the system

¹ The division of the development process of social welfare after 1989 into two stages i.e. 1990-1998 and 1999 until the present is applied by many authors. Cf J. Hryniewicz, *Zakres i kierunki zmian w pomocy społecznej*, [in:] M. Rymśza (ed.), *Reformy społeczne. Bilans dekady*, Instytut Spraw Publicznych, Warszawa 2004; M. Rymśza, *Praca socjalna i pracownicy socjalni po reformie samorządowej z 1999 roku*, [in:] K. Frysztański, K. Piątek (ed.), *Wielowymiarowość pracy socjalnej*, Wyd. Edukacyjne Akapit, Toruń 2002.

more bureaucratic. Its role was reduced to distributing funds and controlling whether they were assigned in a legitimate way. This reduction of the role of social welfare was carried out at the cost of social work, non-material services, stimulating economic and social activity of customers etc.

The second public administration reform (1999) was supposed to eliminate the above mentioned flaws of the social welfare system by introducing full-scale decentralization of the social tasks of the state, development of self-governance, subjectivization of local communities, imposing on the family the status of the main subject of social policy and reconstructing civic society pursuant to the principle of subsidiarity. Two new tiers of the self-government system were introduced and the scope of operation of the social welfare system was expanded by adding care and upbringing of children and teenagers to social welfare's range of activities. However, the public administration reform was ineffectively prepared. The scope of operation of the social welfare system, its competence and the measures at its disposal were defined in a very vague way, there were no role models and no patterns of operation for new organizations to follow. Staff did not have adequate background to perform the tasks imposed on them, and the formation of self-government administration units as well as the development of local social policy programmes were carried out in a very spontaneous way being at the same time to a large extent dependent on local determinants. The relations between newly established organizations – district centres of family support (PCPR) and communal social welfare centres (GOPS) proved vital for the development of local social policy and social welfare. A comparative analysis carried out by Marek Rymsza² proved that the institutions which constituted the object of the study differ in terms of the form of aid offered by them (basic level in the case of GOPSes and specialized level in the case of PCPRs), the kind of benefits they offer (financial benefits – GOPSes , counselling – PCPRs), the criteria applied to select beneficiaries (income-related – GOPSes , no criteria – PCPRs), the kind of social intervention carried out by each institution (salvage – GOPSes , prevention – PCPRs), the methods of social intervention (casework – GOPSes , community work method – PCPRs). Communal

² M. Rymsza, *Praca socjalna...*

centres pursue the residual model which entails short-term support whereas district centres of family support represent the institutional model, i.e. prevention, in which the need which arises is the only criterion for offering aid. The customers' background is different in the case of district centres from that of the customers of communal centres. District centres find their customers in residential social welfare establishments whereas communal centres' customers are found in the environment they live in. In the course of functioning of the welfare system it turned out that district centres of family support did not take over the functions consisting in providing assistance for the family as they focused their activities on residential social welfare establishments and a few categories of statutory beneficiaries: foster families, the disabled, refugees and charges of foster care facilities. As Halina Lipke³ pointed out the establishment of district centres of family support created an opportunity for social services development by the application of the community work method of social work and by the participation of social services in the formation of local social policy. Favourable conditions for development were created when better opportunities for cooperation between social services and the non-governmental sector were secured by taking into consideration the role of non-governmental organizations in solving local social problems. The establishment of local district services, whose activity embraces all the families, was supposed to alleviate the effects of stigmatization resulting from the fact of being a beneficiary of social welfare and to secure a more rational development and usage of local social infrastructure. The above mentioned benefits resulting from the new organization of social welfare provision after the reform of 1999 were squandered⁴ because of the shortage of financial resources needed to carry out the tasks, random or politically-biased selection of staff and the adoption of the conception consisting in the lack of mutual dependence between communal and district social welfare organizations.

Józefina Hrynkiewicz very accurately indicated the reasons why the reform proved to be a failure. She pointed out that the model of self-government relations requires an organizational culture focused on

³ H. Lipke, *Współczesne problemy pomocy społecznej*, [in:] D. Piekut-Brodzka (ed.), *System pomocy społecznej u progu XXI wieku*, Wyd. Akademii Pedagogiki Specjalnej im. Marii Grzegorzewskiej, Warszawa 2002, p. 57–64.

⁴ *Ibid.*, p. 57.

cooperation and on abandoning long-standing habits of building group identity and social bonds which take into account particularistic interests⁵. When analysing the policy lying behind the reform, Janelle Kerlin⁶ pointed out that centralized fiscal policy was responsible for the fact that decision-making competence lied exclusively with the central tier and was not delegated to lower tiers. In turn the lack of decentralization of the fiscal system imposed constraints on democracy at the district and regional tier. The establishment of municipal districts (powiat grodzki) resulted in aggravating inequality between rural and urban areas with regard to access to financial resources which can be allocated to social welfare provision.

The public social welfare system which was criticized after the reform of 1999 was amended in the years 2003-2004 and successive changes were aimed at lowering the costs of functioning of the system and increasing its effectiveness. In this period legislative measures concerning public benefit activity and volunteering as well as social employment (2003) and a new Act on Social Welfare (2004) were developed. These legislative initiatives were aimed at building a welfare state by introducing the representatives of the community, non-governmental organizations and individual volunteers into the sphere of activity of public social welfare organizations, by stimulating the economic activity on the part of long-standing beneficiaries of social welfare who are threatened with exclusion, and finally by implementing the instrument of a contract upon which the granting of financial aid is conditioned. This instrument should encourage an inactive beneficiary to participate in the process of aiding local communities and in stimulating their activity.

2. An attempt at evaluating the potential of social welfare

In the above discussion concerning the process of development of public social welfare there was no reference to the current effectiveness of this institution and the degree to which the tasks assigned to it have been carried out. The most fundamental question is whether the practice

⁵ J. Hrynkiewicz, *Decentralizacja zadań...*, p. 192.

⁶ J. Kerlin, *Pomoc społeczna po reformie administracyjnej 1999 r.: Analiza polityki i jej skutków*, [in:] E. Leś (ed.), *Pomoc społeczna. Od klientyzmu do partycypacji*, IPS UW, Warszawa 2002, p. 131–176.

pursued in its operations by the social welfare system meets the social needs: fighting the problem of impoverishment and exclusion of numerous groups and areas. In order to evaluate social welfare provision in an objective way it is necessary to analyse human and financial resources at the disposal of this institution of state social policy, its relations with the environment, i.e. local authorities, non-governmental organizations etc. The questions concerning the condition of the Polish social welfare system require empirical data, answers which will not be anyhow biased or based on stereotypes as they commonly are when being discussed in the media. The lack of knowledge concerning social welfare, the staff working for the benefit of social welfare and welfare beneficiaries is associated with the prevalent negative opinion about this institution. Those who criticize Polish social welfare provision use economic, socio-cultural, political and effectiveness-related arguments to justify their negative opinion. Liberally-oriented economists point out too high in their opinion costs of maintaining the social welfare system and of financing social transfers⁷. Researchers conducting socio-cultural studies warn against making beneficiaries addictively dependent on social welfare and thus impairing their individual responsibility. It is suggested that there exists the risk of de-motivation resulting from granting income guarantees. It is also pointed out that the operations of the social welfare system are influenced by politics, which is evidenced by the strategy consisting in granting low benefits to a wide range of subjects (many people are given small sums of money) without the necessity of carrying out a selection. Such selection could induce those who have been deprived of certain entitlements to goods or services which they have

⁷ Stanisława Golinowaska points out that it is necessary to distinguish two clear-cut stages in the functioning of social welfare provision. In the first stage, in the years 1990-1993, there was an increase in the social benefits expenditure (from 0.2% of the GDP in 1990 to 0.6% of the GDP in 1993) and the number of beneficiaries (from 4.3% of the total population in 1990 to 7.8% in 1993). In the second stage, after the amendment to the legislation in 1996, the proportion of social welfare expenditure in the GDP halved and the number of beneficiaries decreased by one third. This cost-cutting entailed the decrease in the value of benefits and the number of people entitled to benefits and the fall in the number of services (from 20.1% in 1980 to 3.8% in 1999). Cf S.Golimowska, I. Topińska, *Pomoc społeczna – zmiany i warunki skutecznego działania*, CASE, Warszawa 2002, p. 28.

hitherto enjoyed to become political opponents⁸. A negative opinion was also expressed about low effectiveness of the social welfare system with regard to helping beneficiaries to become self-reliant, to regain the life resourcefulness they have lost, which pursuant to the Act on Social Welfare was supposed to constitute the main objective set for social welfare.

What is the actual condition of public social welfare? According to the data collected by the Ministry of Labour and Social Policy which were presented on this department's website, in 2007 there were approximately 120 thousand people (119 922) employed in organizational units of the social welfare system. The highest percentage of these social workers (49 796) was employed in nursing homes, 42 907 in communal social welfare centres and 13 279 in foster care facilities. Communal centres are basic social welfare facilities which pursuant to the Act on Local Self-government can be found in each Polish commune. However, the potential of social welfare provision in communal centres measured by the number of human resources ranges from a few employees in rural areas and a few thousand employees in big municipal communes. The scale on which social welfare benefits are granted is manifested in the number of people who in 2007 were awarded the decision on granting assistance which amounts to 2 366 055 and the total number of people being the members of the families to whom support was offered – 4 383 434. The main reasons for awarding assistance comply with statutory provisions (income-related and situational criterion) and have not changed in any way over the years. They are as follows: poverty (2 444 685), unemployment (2 253 734), helplessness in child-rearing and running a household (1 209 303), disability (1 067 844), chronic or severe illness (964 105).

The data obtained from the Ministry of Labour and Social Policy quoted in this paper showing the prevalence, scale and trends in the operations of the social welfare system have been substantiated in the study entitled “Social aid in the opinion of the Poles: who should receive aid and in what form?”⁹ carried out by the Public Opinion Research

⁸ S.Golimowska, I. Topińska, *Pomoc społeczna...*, p. 61.

⁹ “Komu i jak pomagać? Pomoc społeczna w opinii Polaków” Centrum Badań Opinii Społecznej 2008.

Centre (CBOS) in August 2008. 28% of the respondents surveyed by CBOS stated that he or she or a member of his or her family received aid within the social welfare system and over a half of respondents (54%) knew some beneficiaries of this institution of social security. The following groups of people were granted assistance: the poor, the unemployed, the pensioners, people with no professional qualifications. Women outnumbered men as beneficiaries of social welfare. The reasons for awarding social benefits were reflected in the opinions of Poles on who needs support. Most commonly mentioned groups included: the poor, the unemployed, the sick and the elderly. According to the respondents, the following institutions are obliged to support those in need: self-government social welfare (82%) and state social welfare (72%). More respondents expect the aforesaid institutions to offer assistance than it is in the case of family and other traditionally recognized care systems (eg. secular and church charities). The scope of assistance as perceived by the respondents is still too narrow in relation to social expectations as 42 % of the surveyed by CBOS maintain that the number of people who receive social assistance is too small (in 2004 56% of respondents were of this opinion), and more than half of the surveyed (57%) believe that inadequate amounts of public funds are allocated to this purpose (in 2004 75% of respondents were of this opinion). The comparative analysis of the data collected in August 2008 with the data collected by way of a survey carried out in 2004 shows that the respondents evaluated the operations of the social welfare system in more favourable terms. However, the evaluation of the accuracy of allocating benefits resulted in more negative opinions as only 9% of the surveyed thought that only those people who really need assistance receive it whereas every sixth respondent (17%) thought that only those people who do not really need assistance are the beneficiaries of the social welfare system. The analysis of opinions on who should be granted support from public funds and in what form this support should be offered shows that half of respondents believe that using the services provided by the social welfare system is only natural and that these support services should be available to every person who is in difficulties regardless of his or her financial standing. 74% of the surveyed pointed out that the form of assistance should be adjusted to particular circumstances. The human resources at the disposal of the social welfare

system seem to be the key factor which can contribute to the improvement of functioning of the system. The opinion held by researchers on the professionalism of social workers was different from that expressed by practitioners. Marek Rymśa¹⁰ maintained that thanks to the measures which were adopted and implemented in the period of transformation, the process of professionalization of staff is parallel to the formation process of social welfare institutions. The process of professionalization is conducive to building the professional identity of the employees of the institution of social welfare, who as a result of assigning social work to this institution have become synonymous with social workers. Halina Lipke¹¹ believes that in spite of the professionalization process which was initiated in 1990 by passing a bill on social welfare, statutory qualifications of the employees of the public system pose a problem for the public sector. The conditions of improving the qualifications of social workers substantially deteriorated after putting into force the public administration reform of 1999. The function of training staff was assigned to self-governing bodies at the district and regional level, which resulted in reducing the training activity due to the shortage of funds and the lack of understanding on the part of district local authorities of the importance of the professional development of social workers. The professionalization of social services is hampered by bureaucratization which entails a peculiar cognitive dissonance: the qualifications of social welfare staff improve but at the same time the operations carried out within the framework of social welfare provision become more and more routine. In the studies on communal social welfare carried out by the author of this paper in the years 2000-2004 fully competent human resources constituted the least numerous group of professionals. The predominant group was made up of the employees who were of lesser use for the organization and who required a long-term professional development policy. The process of formal professionalization in educational terms was not accompanied by the process of professionalization in terms of skills. A low level of knowledge and limited skills of social welfare staff were also connected with the reasons for which social welfare staff decided to choose this

¹⁰ M. Rymśa, *Praca socjalna...*, p. 99–110.

¹¹ H. Lipke, *Współczesne problemy...*, p. 62.

occupation which were not related to its substance. This resulted in occupational burnout and decreased job satisfaction, which in turn induced staff to give up their job and adversely affected the quality of customer service. The evaluation of the activities undertaken by the management of social welfare institutions revealed the lack of recruitment and staff selection systems and professional adaptation programmes for employees, which would guarantee a more effective control of the inflow of new employees and facilitate the adjustment process they had to go through to meet the demands imposed by the organization. There were no training systems with regard to professional development and supervision and the working conditions were difficult. External determinants, such as the financial standing of local self-governments, a shortage of jobs and the human resources policy pursued by local authorities which hampered professionalization, were only partially responsible for such a state of affairs.

It is possible to verify whether the findings of earlier empirical studies are still valid by means of a study entitled “Analysis and evaluation of the professional background of social welfare staff in Poland” which constituted a report from a research project commissioned by the Ministry of Labour and Social Policy which was carried out in 2007 in the Institute for the Development of Social Services¹². Within the framework of the project researchers surveyed 2521 employees of 362 establishments which represented 11 types of organizational units. In order to present exhaustive empirical analyses the author would have to go beyond the scope of this paper but it is worth focusing special attention on a few findings. It was evidenced in the survey that the profession of a social worker is feminized (86.8%) and that this profession is characterized by a low pay. Average gross remuneration of the surveyed amounted to 2012.33 PLN but almost half of employees (48%) earn between 1000 and 2000 PLN gross. The analysis of the level of education of public social welfare staff indicates that there has been an improvement in this field – more than half of the surveyed claimed that they completed higher master's degree studies or higher bachelor's degree vocational studies. The predominant field of study was still pedagogy but

¹² *Analiza i ocena przygotowania zawodowego kadr pomocy społecznej w Polsce* (2007), Instytut Rozwoju Służb Społecznych, Warszawa

employees also graduated special colleges for social workers (szkoła pracowników socjalnych). In the period of 12 years (the previous research of this kind was carried out in 1995) the number of employees with higher education almost tripled. As regards continuous professional development, the situation was less optimistic. Only 13.6% of respondents completed post graduate studies and only one out of four respondents were specialized in the profession of a social worker. The majority of the surveyed (82.3%) did not participate in continuous education. This passivity with regard to education may be justified by the self-assessment of qualifications held by respondents. Over 4/5 of the surveyed regarded their qualifications as adequate. Over 2/3 of the heads of establishments in which the survey was carried out also expressed a positive opinion on the professional competence of their employees. 2/3 of employees claimed that in the previous year they attended courses and participated in trainings, which should contribute to improving the qualifications of human resources. However, it is hard to evaluate the quality of the training offer and its usefulness for work practice, especially due to the fact that the surveyed participated in trainings only once a year. A low level of training activity of the surveyed staff of the public social welfare system can be attributed to the fact that only in the case of 15.7% of establishments the management allocates substantial funds to the professional development of their employees. The findings of the study presented by way of territorial and institutional division indicate that there exist major differences in respect of the character of the commune (municipal or rural) and between particular voivodships. The largest number of employees can be found in municipal establishments (38.6 on average) and the following voivodships: śląskie, dolnośląskie and mazowieckie and the smallest number of employees can be found in the social welfare centres in rural communes and voivodships (podlaskie, opolskie). The ratio of the average number of core staff to the average number of all the employed indicates an increase in the effectiveness of core operations of establishments in the poorest voivodships in which rural areas prevail over urban areas (świętokrzyskie, podkarpackie, pomorskie) as they are not so heavily burdened with administrative expenses.

In the course of the process of decentralization of social welfare provision which has been carried out in Poland since 1989 attempts have

been made at the subjectivization of social welfare perceived as an instrument of developing social policy in its self-government, local and regional aspects. The provisions of the Act on Social Welfare of 12 March 2004 (Articles 17.1, 19 and 21) facilitate the realization of this objective as they impose on the commune the duty of developing and implementing the strategy for coping with social problems. The development and implementation of the strategy were the tasks assigned to the district authorities and to voivodship self-government as stipulated in the aforesaid Act. The task of coordinating the implementation of the strategy for coping with social problems was allocated to communal social welfare centres, district centres for family support and regional social welfare centres. However, the statutory provisions do not specify the standards of the strategy, the procedure for developing and implementing the strategy, time limits for these activities, and what is most important they do not prescribe any method of fulfilling this duty. The strategies for coping with social problems and their role in developing local social policy were analysed in the research project carried out in the Institute for the Development of Social Services. Within the framework of the research project 500 communal strategies and 99 district strategies became the object of quantitative and qualitative analysis. The findings of the study on these strategies which were presented in the report by Halina Lipke and Agnieszka Hryniewiecka¹³ are not optimistic. A small number of strategies (40% of communes and over 60% of districts drew up such documents) and low quality of these strategies forced the authors of the above mentioned report to advance a thesis stating that there is no clear vision of solving social problems in an effective way and to question the idea that the documents being the object of the analysis are an instrument of designing local social policy. The authors of the report considered the idea that these strategies play the role of a long-term programme of social welfare provision. These strategies are developed on the basis of the reports drawn up by self-governments and statistics collected by these bodies rather than on the basis of a reliable diagnosis of the social situation. They do not try to predict social phenomena, needs and problems. In many cases they can be regarded as

¹³ Lipke, H., Hryniewicka, A. (2008), *Raport Analiza strategii rozwiązywania problemów społecznych*, Instytut Rozwoju Służb społecznych, (an unpublished report)

examples of wishful thinking, formal documents which are of no use from the point of view of local social policy. The situation with regard to the aforesaid strategies is particularly grave in rural areas, which is evidenced by the findings of a nationwide research project “Diagnosis of the Social and Professional Situation of Rural Women in Poland” carried out in 2007 under the supervision of the author of this paper within the framework of the Sectoral Operational Programme for Human Resources Development (activity 1.6 b)¹⁴. The majority of the documents which became the object of the analysis did not meet the basic requirements of the strategic planning method. These documents did not include any method of monitoring the degree to which the objectives were realized, the sources of funds and estimate costs of pursuing strategic objectives. Only a few strategies were developed with the application of the participatory method which makes it possible to build local partnership focused on the activities aimed at solving local social problems. Many documents were drawn up with the application of the managerial method (local authorities and officials) or the expert method (hired consultants)¹⁵. In the light of the findings quoted in this paper it may be stated that the strategies for solving social problems which theoretically constitute a perfect instrument of social policy planning and of mobilizing local resources do not fulfil the functions attributed to them with regard to integration, building local partnership and social education of self-government bodies and social actors.

¹⁴ Krzyszkowski, J. ed. (2008), *Diagnoza sytuacji społeczno-zawodowej kobiet wiejskich w Polsce*, Ministerstwo Pracy i Polityki Społecznej, Departament ds. Kobiet, Rodziny i Przeciwdziałania Dyskryminacji

¹⁵ Przywojska, J.(2008), *Strategie gminne i powiatowe jako instrumenty polityki władz lokalnych wobec kobiet wiejskich*, in: Krzyszkowski. J. ed. (2008) *Diagnoza sytuacji społeczno-zawodowej kobiet wiejskich w Polsce*

3. Problems and prospects of public social welfare

The above discussion shows that although there have been many reforms implemented after 1989 researchers and practitioners point out long-lasting flaws of the institution of social welfare. Jakub Wygnański¹⁶ grouped these flaws under two categories: structural and systemic faults and functional constraints. The first category encompasses the following faults: the lack of social problems diagnosis, social bureaucracy, a more and more fragmentary nature of local welfare, badly-made social law and the lack of local, regional and central social policy. As regards the category of functional flaws, they include unequal access to social services, the routine character of activities, the lack of local social policy and budget-oriented instead of task-oriented planning. Joanna Staręga-Piasek¹⁷, who was one of the people responsible for developing a new social welfare system after 1989, criticizes the functioning of the system with regard to fighting poverty and social exclusion. In her opinion social welfare in Poland does not fight poverty and exclusion. It is an institution whose structures of beneficiaries are ossified, which leads to decreasing the activity undertaken by the beneficiaries and finally to creating social pathology. The critical opinions presented in this paper are legitimate but they do not devote enough attention to the vital issue of managing social welfare establishments. If the legislative measures aimed at improving the functioning of the social welfare system are to be effective this complex institution must be well managed. If the way in which social welfare is managed improved it would be possible to enhance the organization of work and to prevent overburdening of social workers with administrative activities carried out at the expense of their core activity – social work and thus to minimize the risk of occupational burnout. One of the faults of the system is the focus on short-term activities and the lack of long-term strategies and solutions. The course of action for the system is defined with reference to the so called “fiscal year” and there is no strategic planning at the district and communal level. The issue of

¹⁶ Wygnański J. a talk delivered during the Sociological Convention, Zielona Góra, 2007

¹⁷ Staręga-Piasek, (2005), *Pomoc społeczna. Próba oceny funkcjonowania pomocy społecznej w zwalczaniu ubóstwa i wykluczenia społecznego*, [in:] Golinowska, S. Tarkowska, E. Kopińska, I. Ubóstwo i wykluczenie społeczne. Badania metody wyniki, IPSS

strategic planning is a problem which urgently needs to be solved because of the requirements imposed by the European Union for using the EU funds. The cooperation between public institutions of social welfare provision and non-governmental organizations constitutes another issue which needs to be dealt with. In order to be able to solve social problems at the local level it is necessary to foster cooperation and partnership between public and non-governmental subjects operating in the field of social welfare. The analysis of the functioning of communal organizations dealing with community social welfare indicates that they focus their activity on the disbursement of benefits. The process of stimulating economic activity in the beneficiaries is hampered by insufficient amount of social work based on cooperation with the local environment and its resources. Low operational effectiveness poses the risk of maintaining the situation of dependence on social welfare, marginalization and exclusion of whole social groups and regions of Poland. Social work focused on building social capital in the local community with the purpose of solving the social problems pertaining to this community seems to be an alternative to the application of the community social welfare method which has been applied hitherto. The analyses¹⁸ of local social welfare organizations in terms of the possibility of using them as an instrument of solving the problems of the customers of these organizations and their social environment show that the most effective method of operation consists in using the social capital pertaining to social welfare i.e. the professionalism of managers and social workers, the network of social relations. The findings of a survey¹⁹ carried out among the beneficiaries of social services indicate that there are two fundamental elements which can secure the satisfaction of customers. One of them is connected with subjective treatment of beneficiaries and the other with the quality of service which must be reliable and competent. Other factors which contribute to the satisfaction of customers encompass professional and well-organized welfare provision and the character of the relations with social workers which should be based on partnership. This need for subjective treatment

¹⁸ Krzyszkowski, J. (2005), *Między państwem opiekuńczym a opiekuńczym społeczeństwem*, Wydawnictwo Uniwersytetu Łódzkiego.

¹⁹ *Ibid.*

expressed by customers and their willingness to participate in the process of social intervention in a conscious way was evidenced by the importance attached to the access to the information on the guidelines and procedures for granting assistance. The beneficiaries of social services pointed out how important is the privacy in the relations connected with providing assistance, which should be secured by appropriate organization of a social welfare centre. This need for subjective treatment and enjoying the right to dignity induced researchers to question the opinion that financial factors are the important for satisfying the needs of customers and solving their problems.

The social relations between the environment, local institutional actors and the local community in the territory where social welfare facilities operate are vital for the quality of social welfare provision. The findings of research²⁰ prove that the quality of relations between social welfare facilities and the environment is low. Local authorities do not constitute a suitable partner for managers and social workers, which is manifested in the attitude of local political elites as well as in the strategies adopted by self-government bodies for social welfare provision which ensue from this attitude. The relations between social welfare and non-governmental organizations which operate in the commune constitute a source of social capital. However NGOs cannot be regarded as a significant partner of social welfare centres due to the fact that there is a very limited number of them and they are characterized by a small potential. The negative attitude of social welfare staff to the members of associations and foundations also hampers the development of useful relations. They are regarded as unreliable and incompetent and as the rivals of social welfare centres in the fund-raising battle. Other public subjects of social welfare seem to play the role of a natural source of social capital and an operational partner but the analysis carried out in this field point out that there is no cooperation between public subjects as regards social welfare provision. In order to build local partnership it is necessary to improve the relations with customers, local authorities, public subjects and social organizations. Good relations with the aforesaid partners may result in an increase in the effectiveness of the social welfare provided within the local community and augur well for

²⁰ *Ibid.*

the changes introduced to the system, financing, the role of the employee and the customer as well as the role of the environment. Social welfare depends on local authorities and the public opinion and occasionally it may become the subject of the political game, which requires special knowledge and skills with regard to public relations.

The authors of the report drawn up by the Institute for the Development of Social Services which was quoted before recommend undertaking activities aimed at promoting education and at increasing the availability of continuous education. However, this requires the allocation of additional funds to the professional development of social welfare staff. The aforesaid activities should be accompanied with the measures aimed at improving the financial standing of social welfare staff. One of the most important measures should be the Act on the Profession of a Social Worker which would improve the social perception of this profession, guarantee higher remuneration and improve the image of a social worker. The organizational structure of social welfare institutions also needs to be amended. The activities aimed at enhancing social welfare provision by self-government bodies with regard to its organization and financing should be carried out in the areas characterized by a low level of urbanization.

It is necessary to support the development of the non-public sector in social welfare provision i.e. non-governmental organizations and to promote valuable private initiatives in the areas struck by the shortage of public services (eg. home care services). However any attempts at uncontrolled marketization or privatization of care services provision or at handing over the provision of certain social services to the non-public sector should be prevented. In order to carry out a rational privatization process we cannot focus only on the capital on the part of investors and potential customers but it is also necessary to secure a public system of supervision which would enforce the conformity with adequate standards and availability of services offered by non-public subjects (the scandals which take place in private nursing homes prove that there is no such supervision).

All the conclusions and recommendations presented in this paper which are targeted at the authorities, managers and social workers can produce fruitful results as long as social welfare provision is regarded not

as a cost but as an investment in human resources aimed at reducing social exclusion.

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PUBLIC DISCOURSE – A NEW FIELD OF SOCIAL WORK

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Abstract:

There are many faces of exclusion in contemporary social life: economical, juridical, human rights etc. Regarding the phenomenon we very often pass over the most important dimension of the process of exclusion that is social communication. Being excluded person means not only living in poverty (below minimal monthly income), without own physical space (home) or without full citizen/human rights. „Outsiders” are very often excluded from symbolic (communicational) space both on everyday and public level.

Although I am conscious that the two levels are strongly linked, in my participation I will focus only on public discourse because on the level many mechanisms of communicative exclusion is clearly visible and conference's speech limitations force to hard choices. I will adopt theoretical and methodological perspective of conversation analysis.

Public discourse is main source of our citizen knowledge, very often the only one source. The knowledge consists of the facts (recent events, viewpoints, arguments, figures) but also of argumentative structures (how minorities are presented and commented, what type of identities/labels are connected with particular viewpoints, what system of values dominated). Unfortunately location of public discourse between policy and business makes accomplishing the informational and educational mission very complicated. Detailed analysis of the complications seems necessary preliminary condition of positive or negative answer to the title question, because at first excluding tendencies (at least possible) of public discourse should be assessed.

Being out of public discourse means being out of contemporary society and out of democracy, as a consequence. Regarding, on the one hand, mechanisms of public discourse (dynamics of topics: appearance, existence, disappearance) and, on the other hand, possible usage of public discourse as a platform for exclusion protection and including activity, it seems possible to elaborate some indications for practitioners working in the field of citizenship education.

Keywords: exclusion, public mechanisms, politics, discourse, mission

Introduction

At the beginning of the history of social work we searched for reasons of social problems in a person or rarer in a group. The main stream of professional activities was focused on individual or social diagnosis and medical-like treatment (Richmond, 1917). The only one duty of society it was to find material/financial/organisational resources for social work and delegate well-educated professionals. After years of not very successful fight for better life quality of unprivileged individuals we learnt from the field that social work meant much more than a case work.

In 50's the idea of community work was strong enough to inspire important part of American and European social workers. Many of them found that individual treatment is pointless if not connected with increasing social participation of the client. Socially excluded person becomes step by step an outsider and the process, often beginning from the labour market and social settings, always finishes on social communication. At the stage, excluded person is not only an unattractive entity but is perceived as dangerous by the rest of the society.

Nowadays there is no doubt, that the phenomenon of social exclusion can be dangerous for whole society, especially for political (democratic) order. We are more and more conscious two levels of communicative exclusion: common sense communication and public discourse. My contribution will be focused on the second level.

Language and society

The issue of communication seems to be very popular last times. It has started at the beginning of twenty century with many very influential philosophical concepts i.e. by John Austin, Ludwig Wittgenstein or Jürgen Habermas. These authors found that language is not only a medium, not only a tool for communication, but language and exactly speech acts are major kind of human activity.

John Austin shifted field of interest of communication theoreticians from semantic into human activity. In his concept he divided speech acts into three categories: locution, illocution, and perlocution. The main idea of the diversification it was to show that in speech acts people not only inform others about something (locution) but very often they tend to influence other people, force them to do something, to rise positive or

negative impression, to disturb or empower emotions etc. (illocution). From the perspective of presenting in the text viewpoint, the most interesting is the third type of speech act, because the performative speech act is an example of “pure” activity (the message itself is an action), perlocutionary acts are the side-effects of acting in saying something. Illocution represents indirect activity, actor uses words to force someone's activity, act of perlocution is a social act in deed with no respect to consequences (appears or not), see. sacramental “yes. I do” during wedding ceremony. (Austin, 1962, 13)

John Austin was not able to assess the quantitative size and range of the phenomenon of perlocutive speech acts, but he drawn clear picture, how people use language, how they use words.

The importance of communication for philosophy (epistemology as well as ontology and axiology) was very emphasized by Ludwig Wittgenstein, another twenty century philosopher. In his concept thinking about structure of the world rises epistemological questions about sources of knowledge in society. He found that language is only one source of the knowledge, and concluded that the structure of the language (everyday grammar) is the structure of our world, because language picturing the way things are (Wittgenstein, 2006, 2.1). The way how we used to use words describe the world we live in. Plural in the last sentence is very grounded, because Wittgenstein opposed to philosophical individualism. For him language is not constructed individually, language is social “from the nature”.

Many authors claim that there were two Wittgenstein (“the early” and “the late”) and two Wittgenstein's philosophy of language – mentioned earlier the theory of structural identity of language and world and the language-games concept. Regarding questions how people learn language, Wittgenstein changed his ideas, he discovered that words have no dictionary meanings in common-sense communication. The meaning of the words is constructed, appears in usage, in communication. The same word (for example “game”) have many contextual meanings and people rather play words, than adopt some definitions of them. In the light of the concept, language competence should be perceived as knowledge about the rules of the game, not about meanings of the words. So the important subject of scientific (philosophical) investigation should

be “grammar” of the language, common-sense rules of using language in everyday life (how people play words).

The third mentioned before philosopher Jürgen Habermas represents assumptions not so clearly connected to my point of view, but his very important work on communicative actions can't be cancelled in the text.

Regarding social actions Habermas distinguished four types: teleological (strategic) action, normatively regulated action, dramaturgical action, and communicative action.

In teleological action, oriented to success actors make a decision “among alternative courses of action, with a view to the realization of an end, (...) based on an interpretation of the situation” (Habermas, 1984, 85). They strategically anticipate what other actors will do. Because people usually live in society, their action have to be normatively regulated. That kind of action often is performed automatically, and is regarded as unproblematic by the actors. Sometimes the actor is interacting with people who are “constituting a public for one another, before whom they present themselves” (Habermas, 1984, 86). In the context, people conduct stylized (with a view to the audience), dramaturgical action. But the most important for my theme there is communicative action undertaken when people “seek to reach an understanding about the action situation and their plans of action in order to coordinate their actions by way of agreement.” (Habermas, 1984, 86)

The very sophisticated analysis of communicative action leads Habermas to two distinctive categories i.e. practical and theoretical discourse. In modern mass societies important, complicated or controversial claims are submitted to specialist theoretical discourses (eg. legal procedure, public debate, journalistic investigation). There are also practical discourses in which claims to normative rightness are made thematic and tested. Such processes, especially on theoretical level, rely on rational participants, and we call a person rational if she or he interprets the nature of her/his desires and feelings in the light of social accepted and established standards of value. Such a person also needs to be 'free from illusions' and self deceptions. Communicative action also presupposes that actors are capable of mutual criticism. (Habermas, 1984, 39-51). Both types of discourse are crucial for modern democracy,

because give possibilities of argumentative or political representation in real social life.

Present and still empowered positions of language in modern theory of society allows to formulate some theoretical conclusions.

The first and probably the most important conclusion is that speaking is the same as acting. We chat everywhere with everybody, because we can't keep silent more than few seconds, even most of us work using words in contemporary information world. The conclusion seems to be very clear at the level of individuals but it is also valid at social and political level. We live in very talkative societies (maybe overtalkative) and all important social mechanisms are grounded in communication. Nowadays rational social participation is hard to imagine without access to main sources of information i.e. television and internet. Real political representation is possible only at the level of public discourse.

Second conclusion concerns epistemology. World we live in is created or displayed (dependently on concept) in language. We don't describe world around us in language, we create it playing words. For instance, if I insult someone my behaviour is negative because I use insulting words/language.

The next finding is that language is almost our only one source of knowledge about world. The structure of the language (common-sense grammar) delivers general information about the structure of reality around us and limits our expectations and imaginations in that aspects. For example, question "when do you want to go back?" is appropriate only for those who are out of home (national minorities, homeless people) and can't be used to someone who is "home". The "grammatical" rule creates a structure of social world: someone is a guest and will/should go home earlier or later (the question has sense) but the other is a host because it is her/his motherland (the question is a nonsense).¹ "Grammar" of our language addresses general social relations and it's good starting point for further conclusion.

¹ The example is taken from provocative Internet film "Philharmonie Köln - 40 Jahre Einwanderung" prepared by Turkish minority in Germany (http://www.kanak-tv.de/popup/philharmonie_video.html)

Social relations consist of speech acts. Even if someone uses physical aggression usually before, during or at least after the proceeded communicate with the victim. Very often the speech acts are much more important, much more painful than physical pain. Conducting research into social relations or changing the relations always means scrutinising or reconstructing structure of communication.

The last conclusion of theoretical introduction seems to be the most important. Exclusion from the society is always a set of communicative acts at the level of common-sense communication as well as at the level of public discourse. How long the majority “discusses” (even argues) with minorities, the communities are not excluded and still negotiate their social status. So social inclusion always means establishing communication at general (political) level and in everyday reality.

Public discourse

In twenty century mass media changed the way people communicate totally and created new perspectives for public discourse development. The phenomenon of public debate is very old but mass communication and complicated political structures reconstructed the place and range of the debate in social settings.

Concerning philosophical definition, discourse is a set of linked parts ordered one after another (one-line order), so discursiveness is a *conditio sine qua non* of each language (words have to be ordered in sentences). In the context of mass communication, discourse may be perceived as a set of logically linked arguments or debates on the same topic. Theoreticians of discourse pay attention to the context of each element of debate (micro context) and, in general, cultural, political, and economical frames of reference (macro context).

At the micro level each previously used argument creates a context of the next one. Understanding of the discourse is contextual, it means - depends on knowledge on previous argumentations or presentations.

The special interpretative context of the public discourse is knowledge about participants of the debate. Even very comprehensive understanding of the arguments might be reconstructed by some bias or attitude to speakers. In mass media the effect is emphasised, because the most of public actors is well known to the audience: they are popular, controversial, icons of the pop culture, hated but watched, perceived as

smart or wise etc. In that point it is hard to clearly distinguished is the (pre)knowledge micro or macro context.

The macrocontextual influences on discourse and its interpretations are much more complicated. There is economical impact on public discourse, primary on the time and duration of the programmes. Some programmes are very popular and are recommended to appear in the most expensive “prime time”, some of them are not so popular but very important and can appear by night, and there are unpopular and inappropriate programs that can't be on air at all. Some programmes are “live” without multilevel control, others can not be presented without elaborated procedures of evaluation and highest bosses' permission. But economy influences public discourse also as a frame of reference, many concepts used in debates have economical origins and economical perspective and the arguments are perceived by both direct participants and audience as very important. Of course economy is only an example of macrocontextual influences on public discourse and similar analysis of cultural, religious, political etc. influences might be successfully undertaken, limited size of the work forced me to leave the analyses for further study.

But one notion should be done right now. Relations between policy, economy, etc. and public discourse is not one-way influence, because public discourse influences mentioned disciplines as well. The best example of the mutual relation is fashion: we can't imagine any fashion without promotion in mass media but at the same time we are very conscious that some parts of public discourse are a result of the fashion. Media creates social reality but parallelly the media are a product of the reality.

Citizens' knowledge, attitudes and activities

For about one hundred years sociology of knowledge has been involved in search for sources and mechanisms of social knowledge. Without any ambition to present results of the long-term investigation I would like to focus on relation between common-sense knowledge and public discourse.

There is no doubt that mass media are the main or even the only one source of our political and macroeconomic knowledge. We learn from television programmes: who is the president of our country, what is

her/his political orientation, when is economical crisis and when Stock Exchange Bullish. But the observation is much more universal. Public discourse delivers information about almost everything: social structure, minorities, world and cosmos. Our knowledge of our place in social structure and our dreams are results of mass communication because we still compare to pictures of other people in television. Even taken for granted and very strong belief that the Earth is a sphere is a part of our mass medial education (television, books), because there are only very limited number of people, who has seen the globe from the space, and our everyday experiences go against the fact rather than confirm it.

It would be a mistake to limit mass medial influence only to social knowledge. Structures of our thinking are the very important field of the influences. According to Wittgenstein's concept, the structure of the language is a structure of thinking and, in consequence, structure of world we live in. Public discourse shapes structure of our language, rebuild system of our associations, establishes language/social relations, makes some discourses dominating and other hidden or not present. In the result our world consists of elements (arguments, groups of people, ideologies, etc.) and structures (rules of correctness, strategies of degradation, styles of life, etc.) that have appeared in mass communication. For example, our attitude to Muslim neighbours often more depends on structure and context of medial messages than our everyday experiences, we are afraid or we feel that we should help, because we have watched terrorists' attack or troubles of Arabian people. Even if we oppose the medial messages it influence our mind and our communicative actions.

Social problems

The question of social issues in public discourse is worth a little more detailed analysis, because the issues are the main field of social work.

Traditionally social problem is defined in quantitative manner as a trouble concerning large group of people, but if we look at contemporary social and political reality we found that there are many quantitatively small but socially important problems. Thomas Rauschenbach described the mechanism of social service development in Germany after Second World War (Rauschenbach, 1996). He pointed out that great expansion of social work in last few decades can't be explained increasing number of

important social problems, because after the war people needed much more support than in 80's. Rauschenbach concluded that one of important reason of the growth is social advertisement and promotion of social work. Taking into consideration the fact and powerfulness of public discourse, the definition of social problem should be changed. Quantitative criterion should be replaced with mass medial one, because nowadays the most important is not how many people is in the trouble, but how many people is informed about the trouble and perceived it as very important. If many people feel they are responsible for resolving a problem, even if it is not their problem, the problem should be regarded as social problem. But social assessment what is important and need to be resolved is shaped by mass media, so the conclusion that social problems are created in public discourse will be not very exaggerated.

Mass medial influence on social problems is not limited to naming them. In public debate are determined strategies of solutions. Some of them are the rational result of the discussion, others are the result that the problem was made public. If a problem appears in media, the political/expert discussion starts, but in the same time bosses of different organisations responsible for resolving the problem focus their activity on the problem and in result their neglect other tasks of the organisations maybe much more important from classical point of view.

The result of mentioned above public discussion is usually not clear, during debate participants collect different strategies of problem solving without indication what is the best solution. Because the discourse is very often never ending, collection of the solutions is still reconstructed and only informally influence praxis. But on the other hand, because of politicians involvement the debate influences and even creates social policy, so public discourse affects both practical activities and political projects (social policy) (Diagram 1).

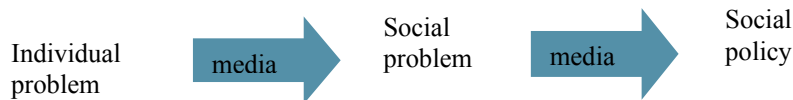


Diagram 1. From individual problem to social policy

Importance of public discourse in searching for problem solutions motivates to deeper analysis of mechanisms of problem selection.

Mentioned previously economical and audience dependency of mass media rises well grounded suspicion that some conditions of the selection make the process irrational. The direct sources of social problems in public discourse there are:

- sensation events (news);
- experts' voices;
- political (governmental) priorities;
- social advertisement and medial activity of organisations;
- own activity of redactors of television programmes.

Regarding direct sources of social problems in public discourse we necessary find sensation events (news). The unusual facts, often exotic, have nothing in common with real life of an average family, and then the events can't represent social problems in traditional meaning. News is attractive if is extraordinary. But there is other kind of sensation events in media, there are extremal facts. The occurrences represent some sort of social problems but in extremal, very often bloody, variant.

Both kinds of mentioned medial events are very attractive for audience, but don't represent real social problems and make the discussion on solutions irrational. First, because the debate, possibly very interesting, will be not representative, and very much public energy will be waste, second, because extremal examples produce special solutions that are not effective or even useless in case of not so extremal example of the problem.

Another source of social issues in public discourse are voices of guests-experts. It seems that the voice could be rational, and from time to time really is, but if we take into account that experts are invited to discussion on topic very restricted by extremal examples, the hope for rationalisation gets weaker. Another limitation is a consequence of the fact that experts are a part of audience with almost the same emotions and structure of knowledge. Similarly, representatives of government and redactors of programmes are maybe not so limited in initiating new topics (new social problems), but their carriers depend on audience's voice, so they often pay more attention to be attractive than to be rational. Some redactors even strategically conflict participants of the debate, if discussion seems to be too rational (boring for audience).

Different organisations, especially non-governmental, create another social problems. They are relatively independent of audience's

assessment, but they are restricted by possibility of found rising. So the organisations promote problems indicated by founders (usually by government).

After mentioned above, there are some natural, usually periodical factors influencing public discourse. The example of the type is weather or season. Same seasonal changes of weather make some social problems actual, for example, in Polish public discourse, homeless is subject of debate every early winter when the first ground-frost appears.

Resuming, mutual relations of public discourse and social policy and their conditions can be presented like on Diagram 2.

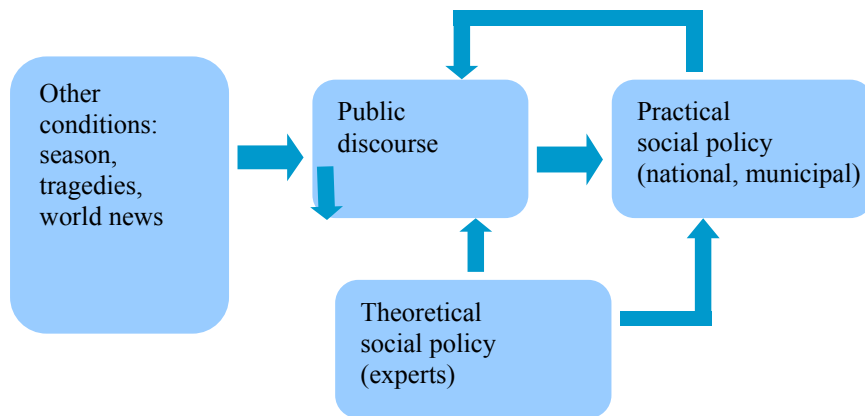


Diagram 2. Public discourse–social policy relations and conditions

Public debate on social questions is a good opportunity for the problems validation. Some of them are highly evaluated others degraded, similarly solutions are criticised. But the important part of the debate usually is focused on looking for responsible or „guilty” institution or person, especially if the reason for the discussion is a extremely tragic case. In the context, very popular is so called “someone else problem” strategy (Czyżewski, Dunin, 1991). Participants create interactional patterns of speech acts and argumentation (logic, economic, rhetoric, based on conversation violence or social expectations, etc.)

Public discourse and democracy

Modern, sustainable and deliberative democracy demands public discourse to eliminate fluctuation between elections. Only ongoing public discussion with respect to audience's voice creates suitable circumstances for presenting different viewpoints, sets of values or arguments on important questions. But similarly to “classical” democracy, discursive democracy works correctly only if all groups of people, all minorities are proportionally represented in the public debate. (Barber, 1989, 358)

The question of participation in public discourse is as well important as social participation. If some groups of people are not represented in public discourse, their perspective, arguments and problems are not taken into account, and in result they have no influence on political decision. Of course, they are still audience and their voice is important, but they can select only other people solutions (passive participation). Paradoxically, the result of the exclusion is that homeless people don't participate in the discourse of homelessness, blind, deaf or disabled person in the discourse of disability and worker class representatives in discourse on labour market.

It is possible that not very high and often decreasing level of political involvement (for example in elections) is the result of the absence in public discourse, because mentioned groups of people feel they are not represented in public debate (their values, perspectives and interests). The lack of the discursive representation between elections decreases chance to create and to promote a real representative, who will be able to win an election.

General effect of the limited participation of widely defined minorities in public discourse is that middle-class values are overrepresented. The “white collar” style of live has dominated mass media, even soap operas mostly promoted lawyers' or doctors' perspective, in contrast, “blue collars” are presented rather in sitcoms. At the very structural level, mass media are completely colonised by elaborated code that is another middle-class insignia².

² The term “elaborated” and “restricted” code is derived from Bernstein excellent theory of codes and social control (for example, see: Bernstein, 1971, 1980).

Public discourse and social work

It seems completely clear that public discourse is not perfect tool for problem solving and democracy developing. Mass media are usually high-profit concerns and the most important criterion for making decision what should be widespread is the audience rate. Even so called public or governmental media are at least semi-profit organisations often politically controlled. Public debate is usually not representative because of the domination of middle-class values and elaborated code. The way language is used within a particular societal class affects the way people assign significance and meaning to the things about which they are speaking (Bernstein, 1971, 76).

“People learn their place in the world by virtue of the language codes they employ” (Littlejohn, 2002, 178). So public discourse is not an appropriate place for working class, they should only watch and learn without any possibilities of expression their point of view, except situation they accept dominated values and become “well-educated” workers³.

In result the incomplete argumentation and the market demands provide to presenting complicated questions as simple, irrational validating of social problems and inadequate solutions. Forced by mass media reactions of organisations are usually spectacular (visible) and oriented on short-term effects (because audience's memory is very short). But there is no other way then mass communication for modern „mass-societies”.

First of all, we need research into public discourse, because the empirical knowledge in the field could be very useful not only for social work but also pedagogy, sociology, psychology and political sciences (Granosik, 2007). But now could public discourse be a useful tool for social work?

Active participation of social work practitioners in public debate seems necessary. On the one hand, the activity will be a kind of promotion and PR building, on the other, it gives a chance for influencing processes of social problem creating and resolving. Social work

³ The same mechanism was observed by Labov in American schools. Black pupils, because of their language, were excluded from class discussions by representing middle-class values teacher (Labov, 1972).

practitioners' voice will be very important supplement of ongoing discussion and to some extent provisional representation of clients' perspective. We can't forget that public discourse is the most powerful tool for reconstructing social imaginations, attitudes and, in result, activity. Appearing and disappearing in social work idea of work with society could come true. There is the only one question, how to create attractive and effective programme or debate.

Public discourse should be also a field of indirect activities of social workers. Social work is naturally placed between a client's everyday life and an institutional/political order (Granosik, 2006). Public discourse seems to be new and very important field of social empowerment. It is impossible to imagine successful social integration (inclusion) of vulnerably groups without appropriate space in public discourse. Social work practitioners should motivate and empower clients to active participation in public debate, the groups being excluded have to be visible, only then they obtain a chance for social acceptance and own place in social structure. But not only excluded groups benefit from the participation, generally if social participation increase quality of democracy is higher, more flexible social organisation (structure) effects less number of conflicts.

We need many different minorities programmes instead of programmes about minority.

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THE CHALLENGE OF HUMAN RIGHTS: CAN RIGHTS CREATE A COMMUNITY FEELING?

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Abstract:

If it is true that rights do not create a community, but presupposes a community, it is nevertheless the fact that rights can deepen the community feelings. This paper discusses the two ways that human rights can strengthen these feelings. In order to do so, it will be distinguished between a classical, static way of considering human relations, and a dynamic way, which involves a more direct commitment of the acting subject.

The paper is divided in four parts. After a brief statement of the problem, the first part deals with the traditional way of conceiving human rights: as inborn and inalienable rights pertaining to every individual. This part focuses on the passive and abstract role assigned to human rights. Rights considered in this way do not imply an active commitment to give help and support when needed.

The second part of the paper deals with a dynamic way of considering the society and the question of values. It will be argued that traditional conceptions of human rights conceive of rights in the frame of an absolute and abstract individualism, presupposing a mechanical conception of man. This way of looking upon man will be confronted with a broader conception of the human consciousness, implying that the human-rights commitment is not only the outermost arc of our obligations, but that they also represent an inner commitment towards ourselves.

The third part will examine more profoundly this new way of looking at the question of human values and rights. It will be pointed out that rights understood in this way get their deeper meaning when they are carried out in active commitment. The essence here is the formal and abstract character of the values, namely that they are universally human, which means that they can be found as goals and guiding factors for all humans, and the material character of the values, namely that they are only concretized when they are realized through human actions: It is just this aspect of them that links humans to their rights as living human beings.

Finally, in the fourth part it will be argued that this philosophy favours a representation of the societal in terms of process or movement, implying that 1) human rights do not impose boundaries between people but include the whole universe, 2) human rights are founded upon action and lived experience, 3) human rights are not only something one *has*, but far more something one *is*, 4) human rights are learnt in social settings, 5) human rights are a constant challenge, as they are at all times threatened by

stagnation and human conformism. All these components of the human rights commitment imply that the society has an obligation to develop those social settings or experiences that can foster further development of social learning, commitment and dialogue and hence to further the idea of a new, dynamic society.

Keywords: Human rights, community feelings, commitment, moral values, moral identity, human consciousness, social learning.

In the last sixty years, human rights have increasingly emerged as an international norm. At the same time, the transformation towards an acceptance of human rights has been accompanied by an increase in scholarly research devoted to the study of those rights. Essential to this discussion is the fundamental issue: *What are human rights?* This question should be the first one to be answered, since before we can engage in a meaningful dialogue regarding human rights, we must first agree on what we mean by that term.

The question as to what human rights are is highly contested within both political, moral and sociological discourses and the field of human rights research. The debate tends nevertheless to presuppose a mechanical view of the human being. In this paper it will be argued that this view, by creating a contradiction in the way the question of the nature of human rights is formulated, leads to an abstract and theoretical conception of human rights. The problem at issue here is the following: Is it possible to consider human rights in a new, pragmatic way, which involves a more direct commitment of the acting subject within society? And would it, on these premises, be possible to lay down the foundation for more practical implications of the concept of human rights, implications that in turn can help us to a better understanding of social processes in terms of commitment and responsibility?

My answer to both of these questions is yes. In order to show why, I will discuss two ways of understanding human rights. I shall argue that only one of them can create a true community feeling.

I. Human rights as traditionally conceived

Human rights have traditionally been conceived of as inborn inalienable rights pertaining to every individual – set up in America in 1776 and in France in 1789 as the foundation for the laws of the state. The beginning of any formal recognition of the human rights regime came in 1948 when the UN General Assembly unanimously adopted the Universal Declaration of Human Rights. This declaration, which still provides one of the most sweeping guarantees of human rights worldwide, begins with the statement that the “recognition of the inherent dignity and of the equal and inalienable rights of all members of the human family is the foundation of freedom, justice and peace in the world”.¹ And the first article in the same declaration stipulates that “All human beings are born free and equal in dignity and rights. They are endowed with reason and conscience and should act towards one another in a spirit of brotherhood”.²

Considered as inborn, human rights have been looked upon as something static and inherent in human nature, meaning that they are conceived of as not being subject to change or relative to anything else: Indeed, human rights are understood as absolute rights. As I will argue further down, a problem arises when one transfers this static perspective to a living and complex reality.

Nevertheless, there are also other problems attached to the concept of human rights. The first problem concerns the term itself. *What are human rights?* There is a significant disagreement on this point, revealing an inability to come to a consensus which would serve as a basis for practical actions within a program of application of the human rights throughout the world. As a matter of fact, most definitions are definitions of convenience as people (or states) carve out meanings and conceptions that serve their best interests.

From a theoretical and philosophical perspective, we find one prevalent definition of human rights as simply the rights one has because one is human, these rights being understood as universal rights, irrespective of any rights or duties individuals may (or may not) have as citizens, members of families, workers or parts of any public or private

¹ *Universal Declaration of Human Rights, Adopted and proclaimed by General Assembly resolution 217 A (III) of 10 December 1948, preamble, line 1.*

² *Ibid.*, article 1.

organization or association.³ Still, it is a very abstract formula: The definition fails to provide any specificity of what actually constitutes a human right.

In a more pragmatic fashion, states have consequently turned to the international treaties and opted for the types of enumerated rights that reflect their respective ideologies. In the West for example, there is a tendency to emphasize civil and political rights, while marginalizing economic and cultural rights. The ideology of the former communist states, by contrast, called for an emphasis on economic and social equality, eschewing the needs of the individual for the greater good. This preference has since been expressed by the developing countries, often to the extent that they support a short-term suppression of civil and political rights in order to ensure stability necessary for economic prosperity. (Civil and political rights encompass, among other rights, the right to life, to self-determination, the right to a fair trial, freedom of expression and freedom of religion. By economic and social rights are in general understood the right to work, equal remuneration for work, the right to fair compensation, the right to join trade unions, the right to education, the right to participate in culture along with the right to food, clothing and shelter.)⁴

³ See Jack Donnelly: *International Human Rights*, Boulder (CO), Westview Press, 2nd edition, 1998, p. 18; see also idem: *Universal Human Rights in Theory and Practice*, Ithaca/London, Cornell University Press, 1989; Julie Harrelson-Stephens and Rhonda L. Callaway: "What Are Human Rights? Definitions and Typologies of Today's Human Rights Discourse", in J. Harrelson-Stephens and R.L. Callaway (editors): *Exploring International Human Rights, Essential Readings*, Boulder (CO) / London, Lynne Rienner Publishers, Critical Connections: Studies in Peace, Democracy, and Human Rights, 2007, p. 5; Maurice Cranston: *What are Human Rights*, London, Bodley Head, 1973.

⁴ The divide between the West and the East, between giving preference to civil and political rights or to economic and social rights led the UN to create two more statements on human rights besides the Universal Declaration of Human Rights: the *International Covenant on Civil and Political Rights* and the *International Covenant on Economic, Social and Cultural Rights*, both of which went into force in 1976. The three documents together are collectively known as the *International Bill of Human Rights*.

Additional international human rights covenants include the *United Nations Convention on the Prevention of and Punishment for the Crime of Genocide* (1951), *International Convention on the Elimination of All Forms of Racial Discrimination* (1965), *Convention on the Elimination of All Forms of Discrimination Against Women* (1979), *Convention Against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment* (1984), and *Convention on the Rights of the Child* (1989). See also the

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The conclusion is that there is no universal agreement on which values the rights are supposed to promote. Most of the preferences are given to a utilitarian approach, which in turn logically would end by rendering relative the meaning of the concept of human rights, and thus creating a self-contradiction since the concept of human rights from the very outset was supposed to be universal.

But there are other problems as well. Human rights were from the outset never inclusive, but rather *exclusive*: They omitted large parts of the earth's population; women, children, people from other continents than Europe and North America, etc. They also distinguished between humans and the rest of nature. The former had, to a certain extent, rights, but the latter did not. Additionally, the human rights set people up against one another: Where, one might ask, did the other's rights end, and where did mine begin? Finally, the rights confront western culture with cultures on other continents: It has been argued that in the name of the abstract concept of human rights, western colonial powers have promoted their own values, especially in Asian⁵, African⁶ and Latin American⁷ countries, as an attempt to impose their own values, with no respect for the unique heritage of these countries themselves. Or even worse: that the rights reveal a new colonialism with the purpose of causing "instability, economic decline, and poverty" in Asia or Africa.⁸

From these remarks I conclude that the classical conceptions of human rights amount to a collection of abstract rights, which are impossible to define in universal terms. Moreover, it seems impossible to

website of the Office of the United Nations High Commissioner for Human Rights at www.ohchr.org/english/law.

⁵ See Rhonda L. Callaway: "The Rhetoric of Asian Values", in *Exploring International Human Rights, Essential Readings, op.cit.*, p. 112-121. See also Fred Halliday: "Relativism and Universalism in Human Rights: The Case of the Islamic Middle East", *Ibid.*, p. 122-126; Imam Zaid Shakir: "American Muslims and a Meaningful Human Rights Discourse in the Aftermath of September 11, 2001", *Ibid.*, p. 127-131.

⁶ See Bonny Ibhawoh: "Restraining Universalism: Africanist Perspectives on Cultural Relativism in the Human Rights Discourse", *Ibid.*, p. 132-140.

⁷ Klaas Dykmann: *Human Rights Policy of the OAS in Latin America: Philanthropic Endeavors or the Exploitation of an Ideal*, Princeton (NJ), Markus Wiener Publishers, 2008.

⁸ Kenneth Christie: "Regime Security and Human Rights in Southeast Asia", *Political Studies*, 43 (1995), p. 206.

specify which specific duties correspond to any given right claimed by someone. Who should fulfil these duties? And can it be demonstrated that they can, realistically, be fulfilled? Human rights are, it is urged, merely “manifestoes”; claims, and not proper rights.⁹ As a consequence of this, it would seem that they do not create a community, or a brotherhood. They are dividing, creating boundaries between different conceptions and cultures. Instead of uniting they cause a “diaspora” of values.

Hence, the task is to understand human rights from a new perspective. This new understanding must imply a conception of human rights in view of relationships, and, as I will argue, relationships as dynamic processes rather than static relations between people.

II. Human rights must be understood in a new philosophical frame

Traditional conceptions of human rights conceive of rights in the frame of an absolute and abstract individualism, i.e. an atomistic conception of man. This means that the rights are not conceived of as relative to the situations in which the persons are engaged, or to the idea of men forming a common brotherhood. In this way *my rights* have a tendency to become *your obligations*. For instance, when we claim a right to expression, we do so in a way that implies, if necessary, the refusal of the rights of somebody else (for instance to freedom of religion). This conception of human rights stems from a certain mechanical representation of society, which regards society as a mere exterior aggregation of beings who exist independently of each other.

This mechanical conception of society has been questioned by several philosophers throughout the 20. century. For instance, the French philosopher Henri Bergson (1889-1941) distinguished between what he calls “the open” - and “the closed society”.¹⁰ By “closed society” he means a society synonymous with natural society; that is a society which is closed upon itself and is characterized by an external and hierarchical authority, by discipline and distance towards strangers and other cultures.

⁹ See David Beetham: “What Future for Economic and Social Rights?” in *Exploring International Human Rights, Essential Readings, op.cit.*, p. 11.

¹⁰ See Henri Bergson: *Les deux sources de la morale et de la religion*, Paris, Félix Alcan, 1932. English translation by R. Ashley Audra and Cloudesley Brereton: *The Two Sources of Morality and Religion*, London, Macmillan, 1935. Reedited Notre Dame (Ind.), University of Notre Dame Press, 1977.

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The individuals, who together form this society, are bound together not with interior, but with exterior bonds, that is through social and economic interests rather than through true love for their fellow men.

This society, Bergson contrasts with what he calls “the open society”. “The open society” is based upon a moral feeling of kinship with the rest of the human world: It consists in a movement towards an increasingly bigger expansion of a universal, living human society where each human being is not bound by his obligations towards a particular state but towards the whole of humanity. This fundamental, open morality is described by Bergson as being a morality of love, where love is conceived of as a sense of community with the rest of the world.

This universal community spirit, which is Bergson’s main point in his treatment of moral and political philosophy, has its roots in a new and deeper understanding of human consciousness¹¹. Bergson stresses the dynamic of consciousness. The deeper consciousness is for him life, movement, creation and freedom, whereas the part of consciousness which is turned towards the outer world, consists of layers of stiffened forms; conventions and habits. Such rigid, static and mechanical forms play a decisive role in the human being’s practical functions. But at the same time they act as a covering of the real life, that is life’s own creative force. It would, in other words, be totally wrong to consider the rigid forms that the consciousness presents in day-to-day life to be the only life of consciousness.

The atomistic and individualistic representation of man is a result of the mechanical part of the consciousness, and not of the deeper layers of mental life. But what is more, these layers are consisting in processes which are purely spiritual and cannot be understood in the terms that we use to describe movements and changes taking place in the outer world. As we cannot divide a mental process, it is clear that the processes which constitute a particular consciousness are the same as those which are going on in each other human consciousness. We cannot tell where

¹¹ The word consciousness is here used as a general term to designate any mental state or whatever it is about a state which makes it mental. Hence consciousness includes not only awareness of our own states, but also these states themselves, whether we have cognisance of them or not. If a man is angry, that is a state of consciousness, even though he does not know that he is angry. To be aware of the fact that he is angry, is another modification of consciousness, and not the same.

another person's dreams stop and ours begin. This means that each consciousness is reflected in the consciousness of the others, that they mutually receive impressions from each other, and that this reception of constantly new mental impressions results in changes of quality in each individual personal consciousness. With a philosophical term these kinds of impressions, which are purely mental movements, are called intuitions.

To sum up: The classical view of human rights is a result of a limited and narrow conception of man and consciousness. In a broader perspective man is tied up with other human beings in a particularly intimate way, which consists in a purely mental relationship. This relationship is nothing but the natural unfolding of human consciousness, while it is the condition of an expansion and enrichment of human consciousness. Regarded from this point of view there is beyond the static representation of society a deeper and more true conception, which depicts society as consisting of people being inwardly engaged with each other: Each consciousness must be understood as consisting of processes that constantly mingle with the processes of the others. Altogether these movements form a whole, of which each individual consciousness is a partial process.

The task of philosophy is to recapture the spontaneous contact with the deeper part of consciousness, and through this contact, to try to understand human beings as related to other human beings. In so doing, it would find laid down a dynamic in forms and a creative power, intimately tied to the effort of consciousness. It is because of this dynamic that the closeness to other human beings and the community spirit which it creates, represents an extension and a fulfillment of human consciousness.

III. A processual theory of human rights

The question now becomes: What are the consequences of this processual theory of man and mind, for the question of human rights?

The traditional view of human rights implies that they should be some kind of property, belonging to the human subject much as material or economic possessions do. That this is a false assumption is proven by the fact that the latter can be taken away from the individual or even annihilated in a way that the former cannot. Hence, we do believe that

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human rights belong to the subject in a more intimate way than being merely something you can claim as “property”.

On the contrary, let us consider human rights as pertaining to the intimate life of human consciousness. On these terms human rights must be looked upon as being linked to the inner nature of consciousness itself: They must in some way be related to the processes in which consciousness consists.

Let us then think of rights as something *common* to human beings, and even more, let us consider them as a product of the relationships through which human beings interact, meaning that human rights have their origin in these relationships and that their aim is to foster new and broader relationships.

This means that human rights do not belong to a subject as a consequence simply of this person being a human, but as a consequence of this person engaging in concrete, living relationships with other persons. Moreover, they belong to him as a consequence of the very nature of his consciousness, whose existence is inwrought with the consciousness of every other person. If we then think of man as having a moral obligation towards the people with whom he interacts (if nothing else, at least the obligation to secure their life, freedom and independency), this interaction being as I said, a kind of a mental relationship which is the very condition for the expansion and the enrichment of his own person, it would follow that some fundamental rights have to be ascribed to every human being, by virtue of his being a part of this common relationship of duties binding each human to another: Hence we would have to say that human rights are rights that pertain to every individual as part of a common and universal community of consciousness, and which are thought of as necessary conditions for the human being to fulfil his (or hers) commitment and responsibility within this community.

Several consequences follow from this view: The first one is that the subject of human rights is not the concrete individual, but the community within the individual. This means that a right is a fundamental right only to the extent that it is general and valid for all the members of the community.

Secondly, this community being understood as the community of all human beings in general, a right is a fundamental right only to the extent that it is universal and valid for all human beings generally spoken.

Thirdly, considered from a formal point of view, human rights consist of an obligation towards the community. This means that individual rights are only formal statements of the conditions necessary for you to fulfil your obligations towards other people.

Fourthly, if we understand rights in terms of the conditions necessary for you to fulfil your obligations, then rights are only realized through a person's actions within a community as a whole. This means that even if you can claim universal, human rights for yourself, these rights do not become meaningful, i.e. they do not materialize themselves as rights, but through your concrete actions towards another.

To sum up: From a formal point of view rights consist in an idea of a universal brotherhood of beings whose existence the very notion of human rights is supposed to bring about. More specifically a right pertains to the disposition in a human being to realize this aim. This means that fundamental human rights as civil and political rights (for instance the right to life, to self-determination, freedom of expression and freedom of religion) must be considered as belonging to a subject as fundamental premises for his commitment to his fellow men. From a material point of view a right gets its deeper meaning as it is carried out through this lived experience and commitment.

IV. Human rights as lived community experience

On these terms, the answer to the initial question of whether rights can create a community feeling is given. The answer is yes. What is more, however, is that the question does not even arise in the first place: Understood from the point of view which has been set forth above, human rights create a community feeling because it is of their very essence to do so. When human rights are looked upon not in the frame of an abstract atomism, but of an organic consciousness theory, they do not divide; they do not create schisms and even less "diasporas". A right is only a right with regard to a law. Human rights are rights as to the most fundamental human principle, and this very principle is implied by the very nature of human consciousness, which teaches us that every individual being is a part of a bigger unity, this unity being understood in

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terms of universal, interchangeable and interrelated processes between all kinds of existence.

From what has been said so far, some general conclusions follow, which might help us specify the nature of human rights and what perspective is at stake here.

A concept of human rights that is exclusive in an age where globalisation has become universal, must create problems; it even seems self-contradictory. The large mistake of the traditional human rights view is that it placed boundaries between those who were included in the concept, and those who were not. A new human rights view must therefore take as its starting point a dynamic view, according to which human rights are seen as a process or movement. A process places no boundaries between one person and others; it can, in theory, expand to include the whole universe, and even embrace the whole of nature.

Secondly, such a definition of the concept of human rights cannot be founded on the thought of an inherent human value. Rather, it must be founded on human *action*. Human rights, we will say, are rights that get their full meaning by virtue of their accomplishment through actions.

Thirdly, human rights are not something one *has*, but something one *realizes*. As such, they are not something one *possesses*, but something one *is*: Human rights are a lived experience or a form of life.

Fourthly, human rights are learnt in social settings. In other words, this philosophy represents a dynamic way of looking at society and social and community work. It favours a representation of the societal¹² in terms of processes or movements, which educates man in order to make him really human. Hence the good reason for calling the values bestowed upon man through this education, true human values, and the rights which follows from them, true human rights.

Lastly, human rights are constantly challenged, as they are at all times threatened by stagnation and human conformism. This fact is caused by the tendency of human consciousness to stiffen, and to create

¹² The term “societal” is to be distinguished from the term “social”. While “social” refers to the various dimensions of the outward productive capacities of the human being and of communities (health, poverty, employment, hunger, etc.), “societal” refers to the inner relational capacities of a citizen and of a community (capacity for plurality, acceptance and affirmation of the value of otherness, relativization of one’s own identity, values and visions, etc.).

habits which cover up the real inner life and the life's creative forces. Therefore, society has an obligation to develop those social settings or experiences that can enrich the creativity of consciousness. Moreover, society has an obligation to commit to dialogue and to further the idea of a dynamic society, in order to foster new development and social learning.

In other words, if it is true that rights do not create a community (you need a common history and shared experience for that), but rather *presupposes* a community, it is nevertheless the fact that rights in various ways can deepen and strengthen community feelings.

THE MOST IMPORTANT THINK AT WORK WITH PEOPLE IS THE PEACEFUL WAY OF SOLVING PROBLEMS

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Abstract:

As it is not a secret for anyone, conflicts are a well-known area of human's living. Even old societies could experience many disagreements and argues. So, we can easily say that if that kind of problems had been experienced through the ages, if our ancestry tried to solve that problems, we should not have to worry about that anymore... in theory... because even wise ancestry's brains, even their good advices can not give us a good solutions for that unpleasant events as conflicts definitely are. Nowadays we still have a lot of fights and situations, in which people can not find a common language, in which people need some kind of support to make things better, to improve their life-situation and relations between them – and this is one from the main challenges for social work .

If we take a look at the social policy (because in our reading social work should be treated as one of the institutions to work out the problems) we can observe that problem of conflicts, especially in family, is a big problem in our life. Suddenly, few years ago, when there took place a large transition in many European countries, we could see some moves to make the conflicts more "softer". In 90's social workers and the psychologists introduced in Poland an interesting idea, which is "**mediation**". That kind of negotiations were used even by people from Sparta and Athens, but contemporary people thought that there are many better solutions for solving problems, for example to refer a case to the court. But, fortunately, during the transformation period, many people decided to become social workers who want to try some modern solutions in relations between people. Social workers use the mediation especially for solving familiar problems. This institution has many advantages – for example both sides (people who are fighting) can make a deal - it gives a chance to make them happy. If conflict takes some time, mediation increases possibilities for happy ending and decreases possibility of recurrence of the problem.

Family mediation gives many opportunities for marriages, for example can help in solving problems like alimony or separation for example. Many countries in Europe use mediations since ages but in Poland this kind of institution has just appeared. Poland has a lot of work to improve mediations but unfortunately we need more specific education, more people with necessary skills. We, as social workers, want to inspire support from different professions (as we can observe in other countries). But we still have a long way to make that situation better, we have to show through the practice and researches to our society that mediation is a good alternative for the court trial.

I want to have a chance to present deeper that topic and discuss that problem with people of science from all of the world. I think it is a new trend in social policy so it is worth take a look of that from the social work point of view.

Keywords: conflict, family, social responsibility, marriage, couples

As it is not a secret for anyone, conflicts are a well-known area of human's living. Even old societies could experience many disagrees and argues. So, we can easily say that if that kind of problems had been experienced through the ages, if our ancestry tried to solve that problems, we should not have to worry about that anymore... in theory... Because even wise ancestry's brains, even theirs good advices can not give us a good solutions for that unpleasant events as conflicts definitely are. Nowadays we still have a lot of fights and situations, in which people can not find a common language, in which people need some kind of support to make thinks better, to improve their life-situation and relations between them – and this is one from the mainly challenges for social work .

If we take a look at the social policy (because in our reading social work should be treated as one of the institution to work out the problems) we can observe that problem of conflicts, especially in family, is a big problem in our life. Suddenly, few years ago, when there took place a large transition in many European countries, we could see some moves to make the conflicts more “soften”. In 90's social workers and the psychologists introduced in Poland an interesting idea, which is “**mediation**”. That kind of negotiations were used even by people from Sparta and Athens, but contemporary people thought that there are many better solutions of solving problems, for example to referral case to the court. But, fortunately, during the transformation period, many people decided to become a social workers who wants to try some modern solutions in relations between people. A modern solution, of which I'm talking about is MEDIATION.

What the mediation is?

First, I want to explain, what that term means. I'll start from looking at polish literature, which treats about that topic. In our books we can find a different term to explain mediation, axially "negotiation with one extra person", which is MEDIATOR¹. Mediation is a kind of way, which has to turn us to good results, which is solving conflict². What is important, mediation is a non-obligatory form of solving problems between victim and perp. Mediation bases on an idea/background, that mediator and the others participants of the negotiation have to find that kind of solution, which will be satisfied to both sides of procedure³.

Our law describes mediation as an alternative, peaceful way of solving civil problems. It is a process of solving problems, in which, by the negotiation, mediator try to find a good solutions for sides of crisis/conflict. People do not have to take a part in mediation, if they do not want to. Additionally, they can drop the negotiation in every moment of that process⁴.

What is important, and we should not forget this, that mediation is not a therapy but some kind of showing a good ways of solving problems⁵.

Who the mediator is?

The necessary point of that kind of negotiations, is, as I said before, mediator. It is a man, without who is not possible to put across well effected negotiation⁶. The mediator helps in take a conversation between argue people on a peaceful way. That person try to keep everyone in good moods, without necessary, bad emotions.

Who can become a good mediator?

- a person, who people can trust, who is honest, who can easily speak with new-meet people, who can listen other people and is patient

¹ Pietrzyk A. (2005), *Family mediations*, "Psychological News", No. 4, p. 46.

² Dunajska A. (2006), *Mediation as a good method of solving conflicts*, "Social Worker", No 5, p. 3.

³ Kordziński J. (2007), *Mediation instead of isolation*, "School Director", No 12, p. 13.

⁴ Act of Parliament, 25 July 2005.

⁵ Pietrzyk A. (2005), *op. cit.*, p. 46.

⁶ Banaszek A. (2003), *Mediations after the judgment*, "Social Work", No 1.

- should have a special qualities to become a mediator (should take part in some courses or special lessons
- should be a master of psychology, pedagogy or sociology⁷.

Mediator is a person, who do not prefer no one from sides of conflict, who is neutral and has a good base to put mediation across the good way.

From the law point of view, we will not find a definition which describe a mediator. All we can read is that mediator is a physical person, who has all rights from the law point of view⁸.

In my opinion, all those skills we can find when we look at the social workers. Personally I feel that kind of profession, as social work is, should educate people also in that way- to help people, to help families. Conflicts between people are a social problem, so we, as a social workers can not ignore that part of life as relations between people are. In Poland, usually, when people want to divorce they are direct to the court trial- they need a helping hand, which will try to solve with them the problem, they need social worker as a mediator. Direct them to the court trial is very mechanic and non-human procedure, which destroys human's life. That's why I think that social work has to open more the eyes and do more with that problem, because family's health is our business, not lawyers.

There are some countries, Canada for example, where family have to go to mediator, obviously, because, in other case the court trial will not give them a divorce. I think the same requisite should be introduce in every country.

It is not a new idea that mediator should have a theoretical base from psychology and other human sciences, but it could be more effective if mediator additionally knows an important information from the low. So, maybe the best solution could be to create some kind of *mediation's teams*, in which can work psychologist, social worker and the lawyer. That kind of group can be really useful and can improve a mediation effects.

⁷ Dunajska A. (2006), *op. cit.*, p. 4.

⁸ Act of Parliament, 25 July 2005.

How does the mediation go?

Mediation is a process created by the well-educated mediator. His goal for this is to make the process of communication more easier. He does not express any emotions to no one from the sides of conflicts. He can not evaluate the people and their behavior. He has to be neutral to the end of the session. Additionally, he has to accept all solutions, which are propose by the concerned people (even when there is not any solutions).

Mediation has a confidential character. The time of one meeting takes usually about 2 hours. It is good if there are min 3 sessions, but there are some cases, where people find good for them solution even after 2 meetings. At the beginning, mediator informs about rules of mediation and both sides start to explain what the problem concerns to. At the end of first meeting, mediator decides if the problem can be solve by the mediation⁹.

The rules of mediation

Mediation has also an interesting rules, which are deffinitely good alternative for the people who are interested of mediation. Mediation is restricted, what means taht every information from the meeting will stay only between the participants. Besides, what is really comfortable for the people, mediation has a private character. Both sides can controll the situation all the time and they take a part in every decision, which is taking during the meeting. Very important, from the participants point of view, is that everyone can resign from the mediation in every moment¹⁰.

Social workers use the mediation especially for solving familiar problems. This institution has many advantages – for example both sides (people who are fighting) can make a deal - its gives a change to make them happy. If conflict takes some time, mediation increase possibilities for happy ending and decrease possibility of recurrence the problem.

As I said before, in Poland for a long time we could not here and read anything about mediation. The government was not even interested of that kind of solving problems. The term of mediation was introduced to our law in 1998¹¹. But we still have mediation on a very low level. People often do not have any idea about the madiation, they are not well-informed by the people who are responsible for the informing

⁹ Dunajska A. (2006), *op. cit.*, p. 4.

¹⁰ *Ibid.*

¹¹ Pocent T. (2003), *Mediations in conflicts with children*, "Blue Line", No 2, p. 6.

people. And here we have the social workers. If they are interested of the mediation, if they practice that kind of negotiation with, for example familiar problems, they will inform people about that kind of method for solving problems. So here I see a big necessity to educate social workers in that way. It is really successful, especially in familiar conflicts. In that cases we benefit from the family mediation.

What does the family mediation mean?

Family mediation gives many opportunities for marriages, for example can help in solving problems like alimony or separate for example. Many countries in Europe use mediations since ages, but in Poland that kind of institution has just appear. As I wrote before, our law described mediation in 1998, but we still do not have any term concerned family mediation, from the law point of view obviously¹². But family mediation is especially important kind of helping people, because, if mediation is effected, we can save many people before their life drama. There is many cases, where mediator saved the family from divorce. Mediation helps also people to make a deal when they are fighting about their child-who will take them with after the divorce. During the mediation people are talking with each other, so that's why they can find the solution. In other ways, where people are fighting all the time and they do not talk with each other, they do not have a chance to stop fighting and listening to each other. Mediation gives that opportunity and takes down the pain which always exists in that kind of problems.

There are much more **advantages** of mediation. One of them is to prevent of making conflicts deeper, stronger and makes, that they are not so long. Besides, it is not so expensive as a court trial is, because you do not need to contact with the lawyer (in court trial people are treating not like an individual person but like another number, without feelings). Additionally, mediation is not so "formal" as court is. Imagine a child, whose parents are fighting with each other and he/she has to choose between the parents – it is very stressful for the child and has a big influence on his self-condition¹³.

But mediation has also some **disadvantages**, namely, people do not have trust to that kind of process. They do not believe that the conversation can help them with their problem, so they do not really want

¹² Pocent T. (2003), *op. cit.*, p. 6.

¹³ Dunajska A. (2006), *op. cit.*, p. 4.

to try this kind of negotiation. Polish people are afraid of talking about their feelings to the strange person, so they are attitude to the mediation. So here again is the place for social workers to make people sure that they can trust us.

What kind of problems can be solved by the mediation?: Pre-marital contract, divorces, children's care, familiar problems, adoptions, violence at home.

Many European countries has improved family mediation to the very high level. In my opinion, one from the best example is Great Britain, where first mediations took place in 70's and nowadays they have a really good results of mediations. In 1998, The European Committee advocate, that every country, who is a Union Member, has to introduce a family mediation to the national law. The Committee took that decision, because researches in United States, Australia and New Zealand showed how effective and successful mediations are. For example, those countries showed that mediation gives an opportunities to improve communication between family members, mediation can limit number of conflicts and is much cheaper that court trial (both from the economical and social point of view). Besides, for the effects we do not have to wait so long.

Many countries, not only from Europe, had to change their law, to make the mediation more effective. Mediation is strictly connected with the law, so to make that kind of negotiations more popular we have to try change our law. We, as a social workers, have to show, that it is one from the best solutions for many families, for many children, to make their life more easier after hard experience.

Another country, which is good to recamend are United States of America. In 1990 the number of divorces increase to 50% from all mariages. Americans were looking for an good solutions for that really serious problem. Finally they try mediation, which minimize divorces to 30%¹⁴.

Why do I wanted to discuss taht problem? Becouse I see that mediation can help many people with their problems, but we have to improve that process and take the education of social workers on a higher level.

¹⁴ H. Przybyła-Basista (2003), *Changes In family act In the world*, "Mediator", No 24, p. 5-18.

How family mediation have been created in Poland?

Family mediation in Poland are still “at the beginning of their life”. But what we can observe, the situation has been changed since last 3 years. The development of family mediation is very dynamic and that gives us hope to make this process better in the future. In 2005 our government accepted the act, which has changed a lot in our country. Some people created a few organizations which encourage to resign from the court trial and try to solve the problem by the mediation. Polish people, who want to improve family mediation in our country, are still organizing some programs to show that mediation is an effective form of solving problems. As an example I will use an experiment, concerned to marriages, who want to divorce. To make sure, that it will not be done badly, 26 mediators, who want to take part in that project had to take a part in very strictly course with a lot of useful theory and practice.

The goals for that project were:

- to decide about divorce
- to make a decision, who will take care about the children
- to make a decision about finance

In experiment took part 166 couples, but only 86 wanted to take a part in mediation. The results of mediations are satisfied, namely 71,6% of mediations had finished by the agreement. That result is close to the world’s effects in family mediations, where 50% to 80% of mediations are succeed.

What do people think about mediations?

Around 90% of people, whose mediation was successful, was satisfied from that kind of negotiations. What is interesting, even if mediation was not effective, almost 56% of people was satisfied.

Is not that interesting?

Why people who could not make any decisions, with husband/wife were still satisfied? The answer is easy-they finally felt comfortable, they could said whatever they need to say (mediation gave them that opportunity), and they knew that mediator is listening to them (69% of people). About 78% of people said that mediation is much better solution for their children (not so stressful)¹⁵.

¹⁵ H. Przybyła-Basista (2006) *Clients’ resistance to divorce mediation: General mediation in specific family context. European Congress on Family Mediation.*

The Most Important Think at Work With People is the Peaceful Way of Solving Problems

People feel satisfied even if they can not make a decision, because more important is opportunity, which is talk, when people can say what they think about their situation and can make some balance in relations with partner.

Poland has a lot of work to improve mediations but unfortunately we need more specific education, more people with necessary skills. We, as a social workers, want to inspire support from different professions (as we can observe in others countries). But we still have a long way to make that situation better, we have to show through the practice and researches to our society that mediation is a good alternative for the court trial.

Why does the family mediation is still not so popular in Poland?

First - lawyers do not know enough about that method of solving problems

Second - there is still much more cases in court trial than in mediation

Third - Poland still do not have enough of well-educated mediators.

In 2007, in Poland more than 900 couples who wanted to divorce were directed to mediation. 42 of them decided to be together, 34 were wondering and 223 found a good for both partners solution.

I think it is a new trend in social policy, so it is worth take a look of that from the social work point of view.

Nowadays, Poland is still poor if we talk about mediation. How we can convince on that mediations are brilliant solution for many people, if we do not have researches to compare situation in Poland before and after 1989.

We have to talk more about mediation, and I do not mean only Poland but also other European countries. If all Europe speaks about mediation, Poland will follow the same way. And we have to ask about that people from other countries, You, because we, social workers in Poland, are not strong enough to “move” that topic.

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TRADITIONS AND NEW APPROACHES IN CHILD'S CARE SYSTEM IN POLAND

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Abstract:

The implementation of new legislation in Welfare System, and Child Care System in Poland, which has been included in social services since eighteen years – has determined a new paradigm connected with replacing the responsibility for a child to family and to professional residential, non-residential, as well as a local social support system. Due to new legal regulations related to organization, task and functions of child care institutions e.g. residential intervention centres, children homes, foster families - should undertake cooperation between all components of socio-educational environment, which are involved in child development and the process of her/his inclusion. It means that care institution more than it used to be in the past times should become an integral element of the environment, where child was behaved and where it is located approaching full socialization of the child taken under its care. New solutions in child's care system should be also friendly for family reintegration including even dysfunctional families in process of care and underline the role of social child care institution in creating better conditions for respecting individual cultural, ethnic and religious needs for maintaining his/her own traditions and habits of child family and environment. These new paradigms based on humanistic approaches in social work with children and families has found its applications not only in some reforms of social care system, but also in concept of education of social workers.

Social professionals working at child's care institutions should teach children how to plan and organize ordinary life, spare time activities, participate in recreational, cultural and sport events and should develop their own responsibilities for behavior, as well as for their own choices. They should also try to equalize developmental deficits and discuss important issues related to children under care with their parents or foster parents, being aware of better cooperation with different socio-educational institutions which have had direct or indirect contacts or have been engaged in social work with families of children parentage. These new approaches in social work with children under social care system require new professional competences,

This paper will reflect on some issues related to indicated areas of social work in child's care system in Poland.

Keywords: children, education, foster family, social work, intervention

Introduction

The social care system in Poland has undergone a lot of changes during the last eighteen years, not only as a consequence of socio-economical and political changes, which have influenced many social problems of the population, but also in accordance with the modern legislation in Welfare in 1990 and in 2004 (before entering the EU). Transformation in the field has also created the need for new professional competences, qualifications and tasks for social pedagogues and social workers, who are responsible for the implementation of the new approaches to social practice.

In the Child Care System, which has been included in social services since 2000, a new paradigm has appeared, connected with replacing the responsibility for a child to the family and to a professional residential, non-residential, local support system. The new paradigm, which is based on eco-system and cognitive-behavioral theories in social work with children and families, has found its applications not only in some reforms of social care system, but also in concept of the education of social pedagogues and social workers dealing with child protection.

This paper will try to analyze some issues related to the in child's care system in Poland, giving some examples of changes in the field of social work practice with children and families in prospect of the new concepts and paradigms in Welfare System and in training social professionals.

1. Background of the Welfare System in Poland

In the prospect of the European democratic context, the social welfare system in Poland has many features of the institutional one and is aimed at enabling individuals and families to overcome difficult conditions which they are not able to overcome using their own resources. Social welfare is organised by the State in cooperation with social organisations, religious and charity associations, foundations and individuals. The first Social Welfare Act (*Ustawa o pomocy społecznej*) passed in 1990 was intended to provide government aid to the most vulnerable. The new Social Welfare Act of 2004 delegates many of the responsibilities to local communities.

Besides the Social Welfare Act in Poland, the Constitution guarantees special protection to children and families (Articles 71, 72).

The Family Code (*Kodeks Rodzinny i Opiekunczy*) is the basic legal document regulating family relations and child protection, and in 2000 a Children's Ombudsman, who plays an important role in promoting child rights, was appointed. The state government exercises its statutory obligations of control over the social welfare system through the Ministry of Social Policy. Since the year 2000, the organisation of child welfare services has been the responsibility of the Ministry of Social Policy. Under the communist regime, child welfare was part of the national education system.

2. Genesis of the Child Care System in Poland

Poland has valuable traditions in founding a child care system (e.g. Janusz Korczak, Czeslaw Babicki, Kazimierz Jezewski, Helena Radlinska), which come from the period between the first and second world war of last century, as well as in defining concepts of the protection of the rights of the child (in 1978, Poland applied to UN for Convention on the Rights of the Child and governed the commission of its draft until 1989).

After Poland gained its independence in 1918, many foster care programs were established, the best-known being the Lodz program, founded in 1926 by the municipal authorities. In this program, the qualifications required of foster families were set out, as were rules for systematic professional supervision. Foster children were guaranteed free schooling, medical care, medicine and hospitalisation, and even summer camps, with costs being covered by the city and foster parents receiving remuneration (Majewska 1948, 157-162). In 1931, the Committee of Foster Families was founded in Warsaw, and this helped to expand the idea of foster care on a country-wide basis. Starting in 1934, the then Ministry of Social Welfare mounted a Campaign for Foster Families to help to promote the idea of fostering throughout the country (Babicki and Woytowicz-Grabinska 1939; Kepski 1991). By 1938, there were already 10,617 children being fostered by 8,447 registered foster families, some of them additionally qualified (and paid) to care for sick or disabled children (Kelm 1983, 74; Majewska 1948, 137).

Foster care played a crucial role in the care of war orphans. During both World Wars, the lives of thousands of children in Poland were saved when they were placed with foster families. 2,500 Jewish children

smuggled from the Warsaw ghetto found refuge with Polish families (Grochowska 2001). After the war, some of the children returned to their families while others found permanent homes with their foster carers (Gładkowska et al. 1995). During that period, foster care continued to be very common: in 1949, there were about 73,000 children in the care of foster families in Poland (Safjan 1982, 13).

However, with the establishment of the Communist State, the policy changed dramatically. The newly-formed Department of Child Welfare was placed under the control of the Ministry of Education. At the beginning of the 1950s, all child-care institutions were nationalised. Child care programs were no longer encouraged and were replaced by large, state-run children's homes. For many years thereafter, fostering was not an area of interest to those responsible for child welfare in Poland.

The revival of democratic society in Poland after 1989 and the ratification of the Convention on the Rights of the Child in 1991, favoured the rise of child advocacy groups and the deinstitutionalisation movement. The movement began in major cities such as Warsaw, Krakow and Gdansk in 1993, with the aim of influencing the Government towards the reform of the child welfare system. The strategies included advising politicians dealing with children's issues at the parliamentary level, responding to consultative documents and popularising the idea of care by educating society at large (Stelmaszuk and Klominek, 1997).

General child welfare reforms were implemented in the year 2000. Child protection services and the management of child-care institutions were delegated to the social welfare sector. District bureaus for children and family services (*Powiatowe Centrum Pomocy Rodzinie*) were instituted. Funds have been allocated and training programs have been designed for prospective foster carers. The regulations concerning foster care (Order by Councils of the Ministers, 26 September 2000; Order by the Minister of Labour and Social Policy, 14 September 2000) emphasised the rights of children to maintain contact with their families and to have efforts made towards family reunification. Young people were entitled to special assistance, including financial support when leaving care. Initially, all funds were provided from the central budget but gradually subsidies and responsibilities were transferred to local governments. The New Social Welfare Act (*Ustawa o Pomocy Społecznej*) of 2004 and the associated regulations (planned to come into

effect in October 2004) promote further expansion, professionalisation, and specialisation in child's care system (Wyrwicka 2004).

3. New Standards in Social Child Care System

Due to new legal regulations related to the organisation, task and functions of child care institutions, which can be called "new standards for the child care system", institution of child care (e.g. residential intervention centres, children's homes, foster families and others) should undertake cooperation between all components of the socio-educational environment which are involved in child development and protection.

It means that the institution should become more of an integral element of the child's environment than it was in the past, aiming for full socialization of the child taken under its care, and being friendly towards family reintegration, including even dysfunctional families in process of care (Kantowicz 2006, s.941).

It is also important from the perspectives of care continuity and of creating a child's socio-cultural identity that the child care institution should give possibilities for regular, personal and direct contact with parents and others close to the child – unless it is forbidden by the court.

New standards underline the role of the social child care institution in creating better conditions for respecting the child's individual cultural, ethnic and religious needs, so that he/she can keep/maintain his/her own traditions and the habits of his/her family and environment.

Social child care institutions should teach children how to plan and organise ordinary life and spare time activities, participate in recreational, cultural and sports events, and to become responsible for their own behaviour as well as making their own choices. Professionals working with children should try to equalize developmental deficits and discuss important issues related to children receiving care with their parents or foster parents.

Due to legal regulations, professionals should be aware of the better cooperation with different socio-educational institutions which have had direct or indirect contact or which have been engaged in social work with children's families, including:

- Individual forms of social support in place of family life;
- consultative-therapeutic family centres ;

- schools which the children attend now and previously attended;
- official court departments and curators looking after the family and/or child;
- non-governmental organizations, the Catholic Church and/or other public or non-public institutions and organizations, foundations or associations which organize any kind of social support in child's/family's environment.

The social pedagogue and social workers working at the child care institution should realize an individual plan of care, which is based on case study and which considers the child when acting in all levels of his/her social life: the psycho-physical development of the child; personal and school possibilities/achievements; special interests and important activities at school, in the care institution and in the local environment; relations and acting with colleagues/educators; relation with parents and relatives; special needs; important events in the child's life.

The individual plan involves a social pedagogue who works directly with a child in the institution of care, keeping close contact with the child, his/her family and other professionals at institution (psychologist, social worker, speech therapist, curator, director etc).

The social pedagogue (direct care worker) and social worker (responsible for contact with the dysfunctional families of children placed in foster care institutions), should reflect and evaluate on the situation of a given child, exploring the effectiveness of previous methods of the child care process and should modify the plan in accordance with the changing situation of a child and his/her family¹.

These tasks and the new paradigm in child care, replacing responsibility for the child to the family and professionals working with a child and family, become fundamental for realized care treatment and for changes in the attitudes of people participating in a process of care. We have in mind changes based on eco-system approaches, which underline the role of a family and child's social environment in the process of care and education, and which promote many forms of socio-educational support and social work with the family e.g. consulting, supervisions, day centres, recreation centres.

Important modifications are also related to the promotion of foster families and of independent flats for older children under the protection

of pedagogues/social workers. They involve professionals in projects for multifunctional social care institutions, which can offer residential and part residential forms of care, therapy and consulting.

4. New paradigms in child's care system and their consequences in social care practice with children and families at risk

Reconstruction of child care system, ongoing in Poland, but also in other European countries, is related - in general, to decentralization of care institutions and moving the responsibility for child and family social support to local authorities. New paradigms in child's care are based on the "New ethic for children", which comes from Convention on the rights of the child (1989).

It has got implications, e.g. in individual approaches to a child and her/his family; ecological and holistic concepts in social practice with children and families; projecting and planning actions for children care; looking for alternative forms of child care institutions like foster families (new types of foster families), familiar houses of care, daily support centers.

Consequences of those changes in the new child care system in Poland can be shorten to:

1. **new type of responsibility in child care system** and removing tasks of child's care from educational system to welfare system (new institution coordinating child's care in the local environments, which is called "Centers of Family Support");
2. **institution of child's care becomes an element of child's life environment and development**, being friendly for creating her/his socio-cultural identity and her/his (re)integration with natural family;
3. **institution of child's care is responsible for keeping proper contacts of a child with her/his parents** and supporting family through other social institutions with cooperation with other professionals, especially social workers;
4. **child's care institution is introducing new standards in the care** and implements new forms of child's and family assessment (diagnosis), which includes **card of the social development of each child** and **plan for care for the nearest future** (3-6 months) - elaborated with a child, professionals who are engaged

in care process and parents of the child.

5. **child's care institution is responsible for implementing** “the new ethic for children” through educating children about their rights (implementing **the right of the child to knowing her/his rights**)

5. Traditions and new approaches to the education of professionals for child care in Poland

The education of social pedagogues and social workers in Poland has always had many significant features related to the valuable traditions of academic training in the Second Polish Republic since 1925 (e.g. Helena Radlińska's concepts). Even in the “old” educational system in place until 1989, the education of social workers was neglected and mostly belonged to the secondary school system, some academic forms which were established in the seventies and some which had existed since the sixties in the field of the academic training of social pedagogues, pedagogues of care and special pedagogues/educators.

According to E. Marynowicz-Hetka, at least two educational options (models) in which to analyse the various approaches to education for social professions have emerged: the adaptive model and the developmental model (Marynowicz-Hetka E. 1996, 191). Nowadays the developmental model of training, represents heuristic-probability thought, where methods of discovery and action is applied in academic education. Training for a developmental model of social work has been applied in Poland for the last sixteen years, even though it was promoted by Radlinska as the “polyvalent model”. This model requires the use of skills of creativity and alternative thinking in the professional educational process and it can be useful, for example, in social planning, as well as in social projects. In this context, we can find ontological, epistemological and axiological sources of social functioning and acting in professional education for the social professions..

In the work of educating social professions working with children and families at risk, the concept of developing such competences and attitudes which correspond with reflective, professional practice.

There appear to be some questions related to these changes in the education of social workers who deal with children from risk families: Do

social workers possess the proper knowledge and skills related to new standards in child care?

- **How do they react to the new paradigm in the child care system?**
- **Do they agree with sharing responsibility of the child with family and different social institutions in the child's best interests?**
- **What are the new practices in coordinating social projects for children and families at risk?**

It means that during the academic education, social pedagogues and social workers are trained to be able to deal with these new tasks and challenges.

For many social pedagogues and social workers in Poland during last years, the main object of diagnosis and evaluation is the family – its needs and social, economic or educational threats, which are described in different monographic editions. Social workers have an unquestionably important role in those analyses. Through their “micro diagnosis” in the local communities, they are developing new knowledge which is founded on a theoretical background and which is useful for new social projects. Social pedagogues and social workers become aware of the main threats to family development and, through social diagnosis, highlight those categories of families that should be supported. At the practical level, they are planning and projecting the most adequate forms of socio-educational help, mostly for the families “at risk”, to create better chances for children and youth development, social participation and activities for adults, handicapped and old people (Kantowicz 2003, s.569).

Children in social care are often come from dysfunctional/risk families, where they have usually experienced different kinds of abuse and neglect. Child abuse and neglect in a family usually has a long history and symptomatic signs of prejudice, so it needs reliable investigation. In the process of diagnosis of child abuse, a pedagogue or social worker has to know not only the factors of children at risk in a family, but also that he or she should assume friendly attitudes towards the protection: a sensibility and readiness to turn against the facts of child abuse; a willingness to protect a child and to give them effective help; an acceptance of the possibility of cooperation with other institutions engaged in child abuse; a readiness to cooperate with specialists having

contact with the child and his/her family; and responsibility for the process of intervention.

On a positive note, current socio-pedagogical assessments indicate that even parents who occupy lower social positions and are at “social risk” show quite high levels of concern for the care and education of their children. It means that even if the life quality of the family and the living conditions are not sufficient, parents are aware of the importance of higher education and of the possibilities for their children possessing professional qualifications for a better future life.

Conclusions

“Child protection” does not mean the same in every country. In general, the term is used to include protective measures in the context of legislation, with a specific connotation of protection from every form of discrimination, neglect and abuse. Child welfare covers the wider field of support for children and families where there are social and psychological problems, and can be inclusive of “child protection” (Hetherington 1998, 72). Besides aspects of the necessity to undertake social, educational and therapeutic actions against the child’s prejudice in accordance with the best interest of the child, the protection has to be based on solid legislative regulations which allow a legal intervention and adequate help, and which allow sanctions to be applied to adults who are responsible for child and his or her abuse or neglect.

The new ethic for children widely considers special rights for children, and underlines the meaning of prevention and compensative actions for children, especially concentrating on support for families which show symptoms of risk for deprivation (Kantowicz 1998, 81).

In analyzing the child care system in Poland, we should underline the role of different socio-educational institutions in the context of the diagnosis and supporting process. Firstly, the contemporary social welfare system allows families at risk to be looked after and supported. It means that in local social service departments there is a register of families in care and outreach social workers are obliged to collect data about the situations in those families. With regular contact with dysfunctional families, it is easier to undertake early intervention in a situation of abuse and neglect. Secondly, Polish educational and social

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institutions, through professionally educated staff, are very aware about the protection of abused and neglected children.

Anyway, the ongoing process of change in the child welfare system has not yet resulted in many research projects. The first published cross-national study was undertaken through the initiative of the Children's Ombudsman by the Institute of Public Affairs (Raclaw-Markowska & Legat 2004). Overall, the research that has been undertaken documents a general acceptance of the reforms and the difficulties with implementation. It confirms, however, that the new paradigm in the child care system in Poland is expanding and is perceived as a promising acceptance of social/care professionals and local authorities.

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MIGRANT DOMESTIC WORK: CHALLENGES FOR NATIONAL AND EUROPEAN SOCIAL WORK

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Abstract:

In the last decade Western European households have come to rely increasingly on paid domestic labour, mainly women working in the informal sector, for services such as childcare, eldercare, cleaning etc. Many of these women are migrants and transmigrants from Eastern Europe, and a number of them have families themselves.

In this workshop we would like to explore the consequences of these domestic workers' migration, which has been described as a 'care drain', on their own family members. Recently, media attention has focused on a number of child suicides in Romania, with these suicides directly attributed to their mothers' working as domestic workers in other European countries. We suspect that the situation is more ambivalent, with many families depending on domestic workers' remittances on the one hand, but also forced to come to terms with mothers' (and daughters') absence, often for extended periods of time. How can social work in Romania and in Western Europe react to this situation? Which issues need to be addressed, which research questions do we need to ask, which strategies should social work develop, in Eastern as well as in Western Europe, to deal with the consequences of this migration pattern? What type of cooperation would be useful between social workers in the countries that send and the countries that receive migrant domestic workers?

Keywords: **migrants, domestic work, care drain**

The focus of our paper is on the domestic workers currently migrating to Germany and the issues we would like to raise here are quite straightforward: We would like to explore the consequences of domestic workers' migration, which has been described as a 'care drain', on their own family members.

How can social work in Romania and in Western Europe react to this situation? Which needs have to be addressed, which research questions do we need to ask, which strategies should social work develop, in Eastern as well as in Western Europe, to deal with the consequences of this migration pattern? What type of cooperation would be useful between social workers in the countries that send and the countries that receive migrant domestic workers?

In order to discuss these questions in a systematic way we think information on the demand side of this process is important and this is what we, coming from Germany, can provide. So we will start out by talking about social policies and the situation of families that has led to the influx of migrant domestic workers in Germany and will point out some characteristics of the German welfare state and show what this means in practical terms for German working women today.

Then we will ask what aspects of the current employment of domestic workers is a new phenomenon.

Finally, we will address the possible political implications of the current migration of domestic workers as we see it.

I. Some Basic Assumptions of the Construction of the Welfare State in Germany

The German welfare state is an institutionally conservative construction (Epsing-Andersen 1990), with social policies still following the "strong breadwinner model" (Lewis 1992). In this model, basic institutions of social policy assume that the traditional family is the fundamental unit providing welfare, i.e. it is the role of one member of the married couple (usually the husband) to be the main provider of income for the family through his participation in the labour market, while the role of the other half of the couple (usually the wife) is to concentrate her efforts on taking care of the household, the children and elderly family members and either not participate in the labour force at all or not work more than part time. There are many facilitators of this "ideal type" of family in our welfare system, e.g. this is the family that the

German tax system encourages, it is the family that our school system takes for granted, it is the reason why there is a lack of affordable official household services for the elderly and so on.

Today, this traditional model of the family is becoming increasingly problematic as the basis of social policy.¹ For many factors have played a role in changing the structure of family life in the last decades, and families cannot provide many of the services that are expected of them without outside help. We can only point out some of the more important developments here. One crucial factor is women's labour market participation which is closely intertwined with women's higher level of education in the younger generations. Married women's labour force participation in (the Western part of) Germany went up from 25% in 1950 to 52% in 2004 (Datenreport 2006:89, Engelbrech 1999). If you break down the numbers according to age groups, today you find more younger women in the labour market, more mothers working outside the home and even when they are unemployed, today's young women not tending to simply disappear into the housewife role, as some would expect, but continuing to look for paid work (this, of course, applies especially for the Eastern part of Germany, where virtually all women of working age were in the labour force during the GDR). Women's labour force participation in (West) Germany still is not as high as in other European countries, but the changes we have seen do have a slow and ongoing impact on the gendered division of labour in the work force². On the other hand, however, we can note virtually no parallel increase in the participation of men in housework and family work (Künzler 1994, 1995, Blossfeld 2006). So this is one source of a vacuum in the area of household work, as working women simply do not have the time to do not only their own housework but the work for their elderly parents and parents-in-law as well.

Another is the changing time and space of everyday life² and the structure of households, with new time and mobility patterns (Bauer/Gross/Schilling 1996) and decreasing household sizes. We find an increase in single person households (many of them elderly people), with the birth rate down and divorces increasingly commonplace, leading to a

¹ Born (1989), Born/Krüger/Lorenz-Meyer (1996) and Krüger et al (1987) have shown that historically the traditional model was never an uninterrupted pattern.

² Jurczyk/Rerrich 1993, Projektgruppe Alltägliche Lebensführung 1995, Voß 1991, <http://www.arbeitenundleben.de/alf-start.htm>

larger number of single parent families, usually single mother households with their children. Living together outside of marriage or 'living apart together' have also become quite normal, so we now also have a larger variety of household and family structures (Bundesministerium 1997, Nave-Herz 2002).

The result of all this is that the prevailing image in West Germany of the typical German household, with the traditional male breadwinner working a full working day continuously and a housewife staying home to look after the children is simply no longer the dominant pattern of everyday life in Germany (even though of course it is still very common). However, German social policy remains based on this assumption of one family pattern of a traditional family nonetheless. This is where paid family helpers play an important role.

For one of the most important factors structuring women's participation in the labour market today is their access to other women's paid and unpaid work. Originally, as women's labour force participation started to increase markedly, family sociologists started out to study this phenomenon by asking: how are patterns in the division of labour in families being negotiated and maybe changing between mothers and fathers when both parents are in the labour force? (and of course that remains an interesting research question). But empirically, we found that the essentially more interesting area of analysis was the complex process in which work is being redistributed between women when mothers go out to work. The extent to which women can be employed at all depends to a very large part on the extent to which they could fall back on other women to "substitute" for them at home. These other women could be grandmothers³, neighbours and friends in their informal mothers' network, paid child minders, babysitters, au pair girls, cleaners etc. - there is often a combination. All in all, reallocation of family work within the kinship network is more important for lower class women, whereas in middle class families, childcare activities tend to be negotiated within mothers' informal networks. And, of course, employing other women to

³ Currently, the redistribution of housework and family work is still mainly taking place within the family network. Grandmothers are the main source of childcare for employed women with children under the age of three in Germany (Moss 1990, Tietze/Roßbach 1992)). However, for many reasons this pattern of support is not likely to be as available in the future.

perform household and childcare activities is very much more important in middle class households for financial reasons.

Here are two examples of how these patterns come together in two families:

Barbara Sommer

Barbara is the main breadwinner of a family with 4 children between the ages of 1 and 9. She works as a very successful journalist, is married to another journalist and lives in a large house on the outskirts of Munich. She and her husband long ago agreed that she would be the 'career person' of the family and he - being neither particularly ambitious nor particularly successful in his career - would be the one to adjust his schedule to hers and the family's needs. Barbara's husband invests far less time in his job than she does, works out of his office in the house and is there most afternoons when the children come home from kindergarten and school. The household also includes a live-in au pair from the Ukraine. The family employs a transmigrant Polish cleaner who comes twice a week and a local German woman to do the ironing. Plus, there are many mothers in the neighbourhood carpooling for the children's activities and, if push comes to shove, there is always Barbara's mother who lives 500 kilometers away but is willing to come to stay and cope with emergencies. Barbara is in the hub of this network organizing everything with a tremendous amount of energy, her full time job notwithstanding. Her lifestyle works for her, but it probably wouldn't for everyone. Often, if she has a deadline to meet, Barbara goes to bed directly after supper the same time as her children at 8 o'clock and sets her alarm clock for 2 or 3 o'clock in the morning to be able to get in some hours of work at her desk without interruptions.

The second example:

Petra Ullmann

Petra works full time as a school teacher and has a fourteen year old daughter. She used to work part time, but went back to a full time schedule after her husband, who was also a teacher, was killed in a car accident several years ago. She lives in Munich next door to her mother, who was her main support after she became a widow and who now needs Petra's help after a major operation. Because of her job, Petra's schedule is very compatible with her daughter's, but with the added responsibility for her ailing mother and two households to care for, Petra says she can only work full time thanks to her two wonderfully reliable Polish cleaners who take care of most of the routine household chores in both her and her

mother's home. Why two cleaners? These two women are sisters, who both used to have jobs for the Polish state administration that disappeared with the collapse of socialism in Poland. For many years the sisters have been taking turns travelling from Poland to Munich and back again in a revolving door type of system, sharing their black market cleaning jobs in Munich as well as their family work in their Polish home town, with one sister looking after both sisters' families at home and the other cleaning for 'their' families in Munich for several weeks at a time.

What do we see here?

Barbara's case points to the fact that the new division of labour between women is not simply a zero sum game, with one group of women being freed from household work by simply handing it over to another group of less privileged women. Instead, we see a complex tableau of women cooperating in varying roles – paid & unpaid, family members & non-family members – and in this case we can also see a man who is very involved. However, even when men take on an unusual degree of responsibility for everyday life in the family as in this example, it is still typically the mother's job to coordinate the various threads and strands of the work of everyday life, even when she has a full time job and she is the main breadwinner.

Petra's case, on the other hand, points to the obvious fact that mothers' labour market strategies are not only dependent on support from older women in the family network, but are can also be restricted by their responsibilities for the elder generation. It is also a typical case in the sense that we see a middle class German professional working mother with a secure job in the formal economy allocating domestic work for pay to foreign women working informally.⁴

⁴ Saskia Sassen points out: "The expansion of the high-income workforce in conjunction with the emergence of new cultural forms has led to a process of high-income gentrification that rests, in the last analysis, on the availability of a vast supply of low-wage workers. This has reintroduced - to an extent not seen in a very long time - the whole notion of the 'serving classes' in contemporary high-income households. The immigrant woman serving the white middle-class professional woman has replaced the traditional image of the black female servant serving the white master." (Sassen 1998:190f.)

A new 'servant class' of immigrant women, many of them transmigrants⁵ of East European origin, are emerging as an important resource for middle class German households.

Womens' participation in the labour market of one nation thus very much depends on the circumstances and strategies of women in the labour market of other nations and vice versa, as the case of these transmigrant domestic workers shows. In other words, the threads of interdependence between working women are often enmeshed in a transnational pattern.

We know that many of the foreign women German mothers hire to do domestic work in order to be able to participate in the labour market are mothers themselves, employing quite complicated labour market strategies of their own. And these strategies, too, are part of an extremely complex pattern of everyday life that these foreign mothers are constructing as transmigrants moving back and forth between two countries. Here we think it is important to see how objective and subjective options are intertwined. The Polish sisters do not want to leave their home town, but their economic circumstances and their local labour market leave them very few alternatives. So they are establishing an intricate pattern of everyday life for themselves as transmigrants, who, as Morokvasic (1994) would put it, are people who leave home in order to be able to stay at home. And they are also establishing a certain lifestyle for the family members who are left behind, about which we know very little so far.

II. An Old or a New Pattern? Or an Old New Pattern?

Which of these patterns are old, which are new? This question is easily put, but difficult to answer, because we do not have enough historical research with a focus on these issues. Older feminist studies in Germany on women's family work, for instance, usually did not look for signs of other women's work in the household but stressed the aspect of the housewife and mother's contribution to society as a type of work in its own right, and if the mothers studied were involved in the labour force

⁵ See Rerrich (1999), Rerrich (2006), Lutz (2007), Lutz (2008). For a discussion of concepts of transmigration, see the contributions in Pries (1997), especially Schiller et al. (1997). For a discussion of the relationship between German professional women and their East European domestic workers, see Friese (1995a, 1995b) and Thiessen (1997). See also Behning (1997), Hillmann (1996), Morokvasic (1994), Odierna/Baumann (1992), Odierna (1998).

as well, the focus of research was usually on the working mother's double day and the search for changing patterns in the division of labour between working mothers and their partners. But once one starts to look for it, one can see examples of a pattern of women supporting women in varying forms and at many different times during the whole of the 20th century.

For example, forced labour in the National Socialist period in Germany included half a million East European women forced to work in large German family households (Mendel 1994). A study of working mothers in the 1960s (Pfeil 1961) mentions grandmothers and paid domestic workers as these mothers' main support on the level of the everyday.

Transnational migration of domestic servants is also certainly not a new phenomenon. For a long time it has been a typical feature of women's migration processes (Bochsler/Gisiger 1989a, 1989b, Chaney/Castro 1989, Katzman 1978, Orth 1993, Wehner-Franco 1994, Wierling 1987).

But are any characteristics of the patterns we are witnessing today new? Three aspects may be not completely new, however they are much more important than they used to be.⁶

First, the aspect of widespread substitution (as opposed to support). Women working in the household today are not mainly assisting housewives, very often they are substitutes for (part of) the housewife and mother's activity and often the major resource setting German women free and enabling them to participate in the labour market. So this is not just a new version of the historical case of women working for and with other women within the context of the household but a rather new pattern in the division of labour, of cooperation and of mutual dependence between women, as well as a very different everyday experience for all concerned.

Second, the aspect of flexibility. We need to note the increasing flexibility of everyday life as a whole, e.g. as a result of increased mobility. For instance, often patterns of cooperation seem to be structured in very short cycles and adjusted and readjusted according to the demands of circumstances that can change very quickly.

Third, the aspect of qualification. Today we see not only unqualified women performing domestic work in the households of

⁶ For a more comprehensive discussion: Ehrenreich/Hochschild (2002), Rerrich (2006), Gather, Geissler, Rerrich (2008), Lutz (2008).

qualified women, but, at least in the German case, many qualified women working in the households of other qualified women. For one thing today's women are more qualified than their grandmothers of former generations were. And for another we can see educated women of some nations leaving their country of origin after their educational achievement has become worthless or less valuable in the context of their local or national labour market, in order to perform domestic work for pay in other countries.

III. Towards a Modernization of Patriarchal Family Structures? Some Possible Political Implications

What do we make of the redistribution of work between women as we have tried to describe it in the political analysis? Several obvious conclusions come to mind.

First, although there has been a great deal of political talk about increasing equality between women and men, more participation of women and mothers in the labour market is not yet leading to a significantly more equal distribution of household and family work between women and men, at least not in Germany. But important processes of redistribution of family work are taking place nonetheless. We are witnessing a modernization of patriarchal family structures as family work is redistributed mainly between different groups of women. If this hypothesis is supported by further research we would have to recognize that (at least German) women's progress in the public sphere is not happening thanks mainly to increasing equality between the sexes, but more likely mainly due to increasing inequality between women.

Second, a number of factors point to the assumption that the new "demarcation lines" emerging between various groups of women follow some of the classical dimensions of social inequality such as age, class, race and ethnic background (Glenn 1992). Younger, wealthier German women and men will be increasingly likely to delegate family work to older, socially disadvantaged and/or foreign women. (And we wonder whether this is not also the case for the migrant domestic workers themselves, when they look for care arrangements for the children and the older people left behind in their home countries.)

Third, we think it is not primarily women themselves who are responsible for such emerging new patterns of inequality between women. Rather, new hierarchies are the result of the interaction of the

situation of two structurally disadvantaged groups in the labour market.⁷ With little or no support for women with family responsibilities in the labour market by social policies still defining work as only taking place outside the home, of course working women will resort to seeking support for family work individually, wherever they can find it. On the other hand, for many groups of migrant women private households are the only part of the economy providing any type of employment at all. Thus, we are witnessing a meeting of supply and demand in a situation that is, it seems, not the result first and foremost of one group of women exploiting another, as some would argue, but first and foremost the result of the problematic structure of the German welfare state in conjunction with the economic hardships and labour market policies of less affluent countries.

In the short run this meeting of supply and demand may be helpful for both groups, providing much needed day-to-day support for some women and much needed income for others. But in the long run, the patriarchal division of labour in German families is simply being modernized rather than challenged in any significant way, as new patterns of social inequality between women are established.⁸ Housework, childcare, care for the ill and the elderly remain mostly women's work in Germany, whether in the public or the private sphere, for love or for money.

And the cost of this “solution” to the housework vacuum in Germany for the countries that many of our domestic workers come from is an open question that we would like to turn to in our discussion now.

⁷ It is important to emphasize that this is not a problem women themselves are responsible for but, rather, the result of a structural one because currently, both groups tend not to politicize this situation but to treat it as their “dirty little secret” - working mothers maybe because they do not live up to the superwoman image, helpers maybe because working in other people's homes offers little prestige and is often illegal.

⁸ This idea was first put forward in Rerrich (1996).

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PART II

SOCIAL INCLUSION OF VULNERABLE GROUPS, PARTICULARLY CHILDREN AND MINORITIES

THE CHALLENGING RETURN: REINTEGRATION OF VICTIMS OF TRAFFICKING FOR SEXUAL EXPLOITATION

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Abstract:

This paper discusses challenges related to the rehabilitation and reintegration of girls and women who are victims of trafficking for sexual exploitation. The discussion is primarily based on findings from a research project on the rehabilitation of victims of trafficking in Serbia, Moldova and Italy.

The project included repeated fieldworks and a series of interviews – with victims of trafficking, rehabilitation professionals, and representatives of various departments, institutions, and organisations involved in the referral, rehabilitation, and reintegration of victims of trafficking. These include representatives of the police and other law enforcement agencies, immigration authorities, local social work offices, and nongovernmental organisations. The majority of the fieldwork and interviews were carried out in Serbia, but some also in Moldova and Italy – the latter known as sending and receiving countries, respectively, for women trafficked through and/or from Serbia.

Reintegration programmes designed for victims of trafficking for sexual exploitation are often initiated through specific rehabilitation activities and services provided in safe houses or shelters. The design and concrete contents of these programmes vary widely, but they are all commonly based on an expectation of a gradual transition towards an independent life without professional assistance.

The paper explores in particular obstacles to a dignified and smooth reintegration and victims' ways of coping with these. These include both challenges rooted in the society at large and in the respective rehabilitation models designed to assist the victims in their reintegration. One of the circumstances that tend to make this transition/reintegration demanding is the fact that a large number of trafficked women come from traditional, male-dominated societies where there is little or no understanding of the fact that trafficking is a criminal offence and of the woman as a victim of organised crime. In fear of being stigmatised and of encountering prejudices, some trafficking victims see no other option than silencing their experiences by cover stories and lies.

The paper stresses the need to take these conditions into consideration when designing reintegration programmes, for instance by facilitating networks or arenas that will allow women to seek support and fellowship. The paper also argues that the wide variety of individual histories, experiences, and future prospects found among trafficked women indicate a need for diverse and flexible reintegration programmes with a holistic approach.

Keywords: Reintegration; trafficking; victims; stigma; prejudices

Introduction

In collaboration with two Serbian researchers (representing the Serbian NGO Victimology Society of Serbia) we in 2005 concluded a research project related to the identification, rehabilitation, and reintegration of victims of trafficking for sexual exploitation. A particular aim of the project was to explore whether and in what ways victims' expectations and needs are met during these processes.

The report (*A Life of One's Own*) from this project is based on repeated fieldworks and a series of interviews – with victims of trafficking, rehabilitation professionals, and representatives of various departments, institutions, and organisations involved in the referral, rehabilitation, and reintegration of victims of trafficking (Bjerkan, ed., 2005). These include representatives of the police and other law enforcement agencies, immigration authorities, local social work offices, and nongovernmental organisations. The majority of the fieldwork and interviews were carried out in Serbia, but some also in Moldova and Italy – the latter known as sending and receiving countries, respectively, for women trafficked through and/or from Serbia.

Trafficking in persons

In order to meet the demands produced by the constantly changing dynamics of trafficking, subsequent international documents have been produced. The most recent is the United Nations Protocol to Prevent,

Suppress and Punish Trafficking in Persons, especially Women and Children (2000) – often referred to as the Palermo Protocol.¹ Article 3 (a) of the Protocol defines “trafficking in persons” as consisting of a set of acts and a set of means:

“the recruitment, transportation, transfer, harbouring or receipt of persons, by means of the threat or use of force or other forms of coercion, of abduction, of fraud, of deception, of the abuse of power or of a position of vulnerability or of the giving or receiving of payments or benefits to achieve the consent of a person having control over another person, for the purpose of exploitation.”

It further defines “exploitation” to include, at a minimum, “the exploitation of the prostitution of others or other forms of sexual exploitation, forced labour or services, slavery or practices similar to slavery, servitude or the removal of organs”;

The following sub paragraph, 3 (b), emphasises that the **consent** of a victim of trafficking (in persons) “to the intended exploitation set forth in subparagraph (a) of this article shall be irrelevant where any of the means set forth in subparagraph (a) have been used.”

Furthermore, sub paragraph 3 (c) stresses that the recruitment, transportation, transfer, harbouring, or receipt of a child² for the purpose of exploitation, “shall be considered ‘trafficking in persons’ even if this does not involve any of the means set forth in subparagraph (a) of this article”.

Trafficking in persons is rated as the world’s second largest and fastest growing international, illegal economy. We have all heard different numbers suggested as to how many persons who annually become victims of trafficking. Whatever number one hears (500 000 or 4 million), it is important to keep in mind that these numbers are based on estimates, or as Elizabeth Kelly (2002), one of the senior researchers and writers on trafficking, has phrased it – they are not even estimates, but “guesstimates”.

¹ This protocol is a supplement to the *United Nations Convention Against Transnational Organized Crime* (2000).

² Article 3 (d) defines “child” as “any person under eighteen years of age.”

Recruitment and vulnerability

We have on several occasions been giving presentations based on our research. Often, we are asked why – after several awareness raising and preventive campaigns – women are still being trafficked. Does this mean the campaigns have no effect? Based on our research findings, we believe some of the answer to this can be found in the ways women are recruited:

Whereas women were earlier often recruited to jobs abroad through false advertisements, at the time of our research they were commonly recruited and betrayed by persons they trust – for instance a neighbour, a friend, or even their own relatives. Moreover, the recruiters are often women. This change in recruitment pattern indicates some of the constantly changing character of trafficking – and reflects the fact that the trafficking networks seem to always be one step ahead of both the police and anti-trafficking organisations.

Cynical recruitment methods are of course not the only explanation to why women remain vulnerable to trafficking. Poverty is for instance frequently mentioned as the root cause of trafficking. To some extent this may be true, but it is not necessarily an exhaustive explanation at the individual level. In reality, the vast majority of women living in poverty do not become prostitutes, and do not become victims of trafficking. However, at a structural level, poverty may be a better explanation, as it may be part of a larger complex consisting of a general breakdown of structures, corruption and the spread of organised crime; all elements that may contribute to an environment where trafficking is possible.

Forms of control and manipulation

As earlier indicated, a large number of women trafficked for sexual exploitation has been recruited and betrayed by people they know and trust. This recruitment procedure ensures that the larger trafficking networks may easily be provided with detailed information about the women's backgrounds, relations, and immediate surroundings.

A psychologist who for several years has worked closely with victims of trafficking told us that she has started to see a pattern in the way traffickers gain the trust of their victims:

Provided the person who intends to exploit a woman knows some details about her family relations, he (or she) will know how to make the woman feel appreciated and valued. Gradually he starts treating her

worse, but at the same time he continuously makes sure she does not give up hoping the situation will improve.

The psychologist illustrated this by the case of a girl who had been trafficked through Albania to Italy:

The girl, who came from an abusive family background, was first taken to Albania, where she was sold on to a young man who told her frankly that his intention had been to exploit her sexually. However, he claimed, after he met her he did not want to exploit her. Soon they became a couple and spent quite some time together in Albania.

When the psychologist first met the girl, several months later, the girl referred to this period as the most beautiful time of her life; she said she had never been treated so nicely before. She recalled in particular how they had celebrated her birthday all night and not gone to bed until early the next morning – and when her boyfriend woke her up later that day, he gave her a diamond ring.

The psychologist presented her analysis of this particular case in this way:

When the girl spoke about this period, she addressed it as if it was a separate period – as if she had never seen this man again. However, it turned out it was the same man who later brought her to Italy, forced her into street prostitution, and demanded she made 1000 euros each night, if not he would get extremely violent. Every time he sensed she could not take more violence, he started talking about the nice time they had spent together in Albania.

“This is a very sophisticated way of exercising force,” the psychologist concluded. She also emphasised the emotional vulnerability of women whose backgrounds are marked by abuse in one form or the other – vulnerability caused by a longing for love, attention and care. Consequently, she warned against simplifying the relationships that have been established between traffickers and their victims: “These relationships are not black and white”, she said, “but on the contrary often extremely complex.”

Rehabilitation

Whereas some women are subject to severe forms of physical violence, others are kept “captive behind open doors” by targeted and effective forms of manipulation and threats posed by the traffickers. Anyhow, for the victims a consequence is a total loss of control and influence over their own lives. Depending on the length and contents of

the trafficking experience, the women may find the transition back to independence and to regaining control more or less challenging.

Our observations indicate that certain phases, or stages, of the rehabilitation process are marked by higher levels of uncertainty than others: This is particularly true of the phases involving a physical transition – such as: from a police station or a hospital to a rehabilitation shelter; from one shelter to another; or from the country of destination to the country of origin. Our findings indicate that the routines as to how and when victims are prepared for a physical transition differ from country to country, and also from one organisation to the other. Moreover, although the shelter employees and other rehabilitation professionals – in our interviews with them – clearly recognised the importance of cooperation and exchange of information with colleagues across borders, in practice they rarely got the opportunity to do so. The relatively limited flow of information between shelters in the region reduces the victims' ability to make informed decisions with regard to their future. What could be a continuum between the different shelters and their programmes often ends up being completely separate, sometimes repeated, stages in the women's transition through the process of rehabilitation.

The challenging reintegration

A large number of the female victims of trafficking for sexual exploitation come from traditional, male-dominated societies where there is little or no understanding of trafficking as a criminal offence, and of the woman as a victim of organised crime. It is known that the majority of the victims choose not to share their experiences with anyone out of fear of stigma and prejudices. This indicates that many of the women struggle on their own in dealing with memories of their painful past.

The fear of stigma and prejudices forces women to develop cover stories and to produce lies that they may have to live with for the rest of their lives. While these lies are a woman's only way of coping with an environment that is not prepared to accept their experiences, this could also be seen as yet another form of revictimisation that turns her into a victim of secrecy and silence.

Nina and Anita were at a very young age trafficked to Turkey and forced into prostitution by violent traffickers. When they finally managed to escape and return home, only Nina chose to tell her parents what had

happened to them. Anita said she could not imagine what would happen to her if her parents got to know.

Anita said: “Although they do not know anything yet, they still do not respect me simply because I was abroad without bringing any money back home. If they knew, I am sure I would not be allowed ever to come and see them again ...”

They both said they feel very stressful, in particular in relation to their parents. They also do not trust anyone anymore. Before they travelled abroad, they used to be happy and easy going, but their experience abroad has changed them both entirely. “I was a virgin when I left,” Anita said with tears in her eyes.

Both Nina and Anita have a dream of finding good boyfriends, getting married and having children. However, whereas Nina believes she would tell her boyfriend everything that happened to her, Anita has decided she wants to hide it – also from him.

Although they are well aware they were both innocent to what happened to them, they still sometimes feel guilty because they accepted to travel abroad and blame themselves with the thought that if only they had stayed at home, nothing would have happened to them.

The privacy and seclusion marking the reintegration of victims of trafficking is commonly at its most intense at the time of return to their native communities. This is the time when the women often have to decide for themselves whether or not to share the truth about their exploitation.

One of our respondents said that although she was not sure that her family would have rejected her if they learned the truth, she chose not to tell them out of fear it would cause them a lot of pain. As a general remark, she said: “Reintegration is difficult when you leave the country to earn money and return home without anything at all”. Another woman, who had been trafficked and sexually exploited over a number of years, told us she had experienced it as very unpleasant to return to her family without bringing with her any money. During the years she had been away from home, she had consciously led her family to believe she had a proper job and that she earned good money. Upon her return, she found herself forced to produce yet another lie to explain for them why she returned without money: “Sometimes it is better to lie to protect your family”, she said. However, even lies cannot always give protection from gossip and social exclusion:

Kristina who had been trafficked to Turkey and forced into prostitution had not yet told her parents what happened to her abroad. However, they knew she had been in Turkey and everybody in the village assumed that if you, as a woman, had been in Turkey, you had been a prostitute. Kristina's mother blamed her daughter for not being able to go to the village market any longer without having people laughing at her. Kristina experienced that nobody in her village supported her, not even her own sisters.

Once during her stay in Turkey she had managed to call home and asked her elder sisters to send her some money. Kristina was in prison at the time and had no money to buy food. Her sister had responded: "If you are in Turkey, you should have money. If you really do not have money, you better stay there and not come home."

There are also women who chose to share the truth with their families and who may experience unexpected support. Jasmina, for instance, who had been trafficked to Albania and violently abused, told her mother and brother what had happened to her. In their case this strengthened their relationship. Jasmina said she was happy that she had decided to be honest with them, but she had decided not to share her story with anyone else.

Other women choose different strategies to get outlet of their frustrations and memories. For instance, one woman we were told about did not tell her parents or other family members about her experiences, but had rather chosen to tell everything to a man whom she had only known for three days. He had tried to prevent her, but she did not want to stop – it was important for her to tell him the whole story. Then, three days later she left him.

Ultimately, the silence most victims of trafficking cover themselves behind implies that the truth about trafficking is rarely communicated to the women's local communities. Consequently, trafficked women's lies and fake stories may, unintentionally, tempt others into following in their footsteps.

Conclusion

To break the vicious circle of silence, changes are required on both structural and individual levels – in both countries of origin and of destination. In destination countries, for instance Norway and Sweden, trafficking in women and children has over the past few years been given extensive political attention and media coverage. Often has the horrifying experiences of victims of trafficking provided political will to support initiatives in the form of rehabilitation and reintegration. In other words, it is after having become victims of trafficking the women are given attention from donor countries.

Take for instance the well-known film “Lilja 4-ever”. The film is about a girl who lived in the former Soviet Union, and who travels to Sweden in search of a new life – concretely to pick strawberries and fruits in the middle of the winter. She is, however, caught by brutal pimps, raped, and forced to prostitution. In the end she commits suicide.

Martin Wyss, chief of mission of the International Organisation for Migration in Moldova, in an interview questioned the fact that – in his experience – most people who have seen the movie are shocked and even cry about the terrible things happening to Lilja in Sweden, but seem quite untouched about the “normal” poverty and despair she had to face at home. This despite the fact that it is clearly her bad situation at home that directly led to her taking the risk of leaving for Sweden. In short, everybody focuses on the consequences of trafficking rather than the reasons that lead to it. This is very, very strange, Mr Wyss goes on to say, because at least two thirds of the movie are about Lilia being pushed into “running away” – she has no hope, no help and no future – she is clearly at risk before she leaves.

As we know, all women in poor countries are not likely to become victims of trafficking. However, some women are more at risk of being trafficked than others. If we manage to identify risk factors, we can also indicate and identify risk groups. As argued by Mr Wyss, if we can identify these risk groups, we can create alternatives that can truly prevent trafficking. But, Mr Wyss, remarks, it takes time to shift the focus from victims of trafficking in countries of destination to the “only” potential victims in countries of origin.

Women who have been identified as victims of trafficking have the right to be offered proper and dignified assistance in the form of programmes of rehabilitation and reintegration. However, in our view,

greater attention needs to be directed to prevent women from becoming victims of trafficking in the first place.

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CHILD WELFARE IN ESTONIA: NEW CHALLENGES AND DIRECTIONS IN POLICY AND PRACTICE

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Abstract:

Child welfare in Estonia is characterized by various unique problems, such as the increasing number of families in need, the shortage of preventive and supportive services, and the lack of consistency and coordination in child protection work. These disadvantages are intensified by current Western European influences on Estonian family structure, such as rising divorce rates, increasing single motherhood and the higher risk of poverty that results from these phenomena. Since re-independence from the Soviet Union in 1991, the Estonian people have enjoyed increased personal freedom, expansion of human rights, a resurgence of Estonian ethnic identity and some Estonians have experienced a dramatic increase in their standards of living. However, the demographic and social changes since re-independence have created serious welfare problems for children and their families. Findings suggest that despite the positive changes in the lives of many Estonian people, problems of children and families are growing in frequency and intensity. For example, rates of HIV are rising as are substance abuse problems along with behavioural problems and violence among children. Today Estonia must cope with the downside of capitalism such as unemployment, homelessness, socioeconomic inequality, poverty and psychological stress, and of course, these factors affect the everyday lives and well-being of Estonian children. The Estonian government has made initial attempts to improve the lives of children such as establishing a child protection system, promoting non-violent parenting, and emphasizing the importance of family values. Despite these efforts, services to troubled children and families are fragmented, inconsistent, insufficient and nonexistent in certain blighted regions of the country. Current services do not meet the real needs of Estonian children.

The author will discuss about the strategies and concepts and with an emphasis on rights and inclusion of children and changes needed in the Estonian child protective system and legislation that will more adequately address the needs of children in this rapidly growing and transitioning nation.

Keywords: Estonia, child welfare, child protection, children at risk, children's rights

General overview of the child population in Estonia

According to the statistics, in 2007 the estimated number of the child population of Estonia was 258 515 children (aged 0-17 years) or 19% of the total population. In 2002 the number of children aged 0-17 years was 297 274 or 22% of the total population and in the year 1990 – 459 853 and 29% accordingly. Since 1995 there has been an excess of deaths over births. In 1990 a total of 22 304 children were born in Estonia (natural increase 2773); the number for 2002 was 13 001 children (natural increase -5354) and in the year 1990 the number of children born was 15 775 (natural increase -1634) (Statistics Estonia 2008a). At present Estonia is characterised by the birth rate lower than or considerably lower than gross reproduction rate (Kask, Mertsina 2007, 19).

Children and poverty

Social changes in the contemporary society is causing poverty and deprivation, inability effectively to participate in the economic, and social life of the society for some of the individuals and families (Sutton 2006; Chapin 2007). In recent years, social exclusion has been more and more recognised as a social problem at the European level (Statistical Yearbook of Estonia 2007, 131).

Social exclusion in Estonian society, the changes in the society have brought a decline in the population's social well-being. The question of reducing the poverty among children is one of the priorities in Estonian social sphere. To define poverty equalised income is used. The main poverty indicator is the at-risk-of-poverty rate, which is defined as the share of people receiving equalised income that is at least 60% lower than the overall median income. According to statistics, in 2004 18% of the Estonian population received the equalised income that remained below this level. By age, children aged 15 or less face the greatest risk of falling into poverty (Statistical Yearbook of Estonia 2007, 132). At-risk-of-poverty rate among children aged 15 or less was 21% in 2000, 18% in 2002 and 20% in 2005. The risk of the poverty is the highest in the households with only one adult member, even worse with a child or children – 37% of people in single parent households were living in relative poverty in 2000, 35% in 2002 and 41% in 2005 (Statistics Estonia 2008b).

Social transfers can be served to reduce the number of the poor in the society. The relevance of social transfers in relieving the poverty is

indicated by the relative at-risk-of-poverty rate before social transfers in 2004 – 39%, which has fallen to the level of 18% due to transfers (Kask, Metsina 2007, 23). The same year benefits (child benefits, disability benefits, etc.) prevented 6% of the population from falling into poverty and helped 13% of children to avoid poverty in 2004 (Statistical Yearbook of Estonia 2007, 133). Võrk and Paulus (2007) have studied how social transfers alleviate the poverty of families with children. The analysis showed that in 2000-2007 social transfers have reduced the poverty (relative at-risk-of-poverty) in this group of population (mainly families with 3 or more children) almost by one third – 20 thousand children or 8-10%. At-risk-of-poverty rate before social transfers (excl. pensions) among children aged 0-15 was 33% in 2000, 29% in 2002 and 31% in 2005 (Statistics Estonia 2008b). Children in families at risk of being poor have less possibilities to have their basic needs met. Poverty results in the non-fulfillment of various needs, and physiological, security, self-actualization, self-esteem, and other needs may suffer. According to Heiner (2006, 89) compared to nonpoor children, poor children are one-third as likely to have had adequate prenatal care, almost twice as likely to be born prematurely, twice as likely to be repeat a grade in school, and about three and a half times more likely to be expelled from school.

Children at risk and need for the help

UNICEF has reported the marked increase in institutional care of Central Europe and the Baltic States during the period of transition, and especially drawn attention to higher rates of child abandonment and rises in poverty-related causes and dysfunctional parenting (see Gudbrandsson 2004).

In the changing society in Estonia, many families with children are in a difficult situation for providing well-being for their children. The number of children left without parental care has increased. In 1995, 1134 children were registered during the year as new clients (children and under 18-year-olds left without parental care), in 2004 the number was 1092 and in 2007 – 1529 (this represents 0.6% of the total child population of Estonia). Registered children who were placed into social welfare institutions these years were 890, 1073 and 543 accordingly. The number of children whose parents have been deprived of parental rights

by court decision or who have been isolated from family by legal decision, was 81 in 1995, 187 in 2002 and 217 in 2007 (Statistics Estonia 2008c).

The number of social welfare institutions has increased, in 1990 there was 26 social welfare institutions for children in Estonia, since 2004 the number has increased up to 38. The number of wards in social welfare institutions for children was 1523 in 1990, 1549 in 2004 and 1621 in 2006 (Statistics Estonia 2008b d). A very low percentage of the children in institutions (between 1-2%) are actually orphans. The majority of the children come from families living under unfavourable social conditions. The difficult and unstable economic situation, which has led to abuse of alcohol and violence, must be regarded as the main reason so many children are neglected and placed in institutional or alternative care. The need for support and help for neglected children has increased constantly. F.e the reasons staying in shelters and rehabilitation centers were mainly lack of dwelling-place (14% of the reasons in 2004 and 19% in 2006), parents abuse of alcohol (11% of the reasons in 2004 and 12% in 2006), violence at home (10% of the reasons in 2004 and 11% in 2006), negligence at home (9% of the reasons in 2004 and 10% in 2006), etc. (ibid.). In 2007 from 1529 registered children 178 were placed into social welfare institutions for children (238 in 2002), 72 children were placed to biological families (441 in 2002), 231 children to foster families (392 in 2002) (Statistics Estonia 2008c).

Child welfare in Estonia

The child welfare system in Estonia is a continuum of programs and services available to children who are at risk of abuse or neglect, or who have experienced abuse or neglect, and their families. Accordingly the primary goal of the child welfare system is to protect children from maltreatment by their parents or other caregivers. The child welfare system also strives to support families by promoting the obligations of parents and caregivers to raise children to the best of their abilities (Lai 2006). Parents have the main responsibility for their children. In case parents are not capable of taking care of children, the state intervenes. Children's welfare is organised on the levels of both state and local governments (guardianship authority for children living in their territory). On the Governmental level the Social Welfare Department of the Ministry of Social Affairs is responsible for coordinating and planning of child welfare work nationwide and creating necessary legislative grounds

for the proper development of the area. For the administration of child welfare and the creation of an environment favourable for child development, local governments shall support children and persons raising children.

National policies and strategies for children at risk

Adequate protection of children requires vastly improved social support for families as well as appropriate legislation (Kufeldt, Simard, Thomas, Vachon 2005, 310). It is the primary responsibility of states to establish policies, laws and services for the protection of children. These should address standards of childcare and regulate practice and agencies providing the services (Van Voorst 2006).

The highest level and most fundamental document relating to the legal position of children and their families in Estonia is the Constitution of the Republic of Estonia (1992). It guarantees the right to the protection of the state and of the law and it states that the protection of parents and children shall be provided by law. To promote children's well-being and to safeguard children's rights in Estonia, following main frameworks are used: Convention on the Rights of the Child (1989), the Republic of Estonia Child Protection Act (1992), the Family Law Act (1994), the Social Welfare Act (1995), the strategy for safeguarding child's rights (2003), and the concept of child welfare (2005).

Estonia joined the UN Convention on the Rights of the Child on 26 September, 1991. In 2001, Estonia submitted a report to the UN Committee on the Rights of the Child; the Committee examined the situation of children's rights in Estonia and put forward their suggestions at the beginning of the year 2003. The Committee criticized the implementation side of the Child Protection Act and expressed their hope that Estonia will take the necessary steps immediately to ensure the rights of the child in real life (the Act mentions the rights, freedoms and duties of the child in detail but does not regulate the implementation issues; the Act has been seen as ineffective in promoting appropriate child protection practice and prevention work with families). In addition to that, it was noted that Estonia lacks an efficient coordination system in the field of child protection, which should be established as soon as possible. The Committee is concerned that there is no process of harmonization between the existing legislation and the Convention and between the various legislative acts. The Committee voiced their hope that Estonia

will finish the national strategy concerning the ensurance of children's rights (United Nations 2003).

In accordance with the suggestions by the UN Committee on the Rights of the Child, the Government of the Republic approved on 16 October, 2003 the strategy for the ensurance of child's rights, directed at the more efficient and concerted compliance with the Convention in Estonia. The implementation of the strategy's action plan is expected to result in the improvement in the efficiency of the organization of the protection of children's rights and promotion of well-being. The action plan foresees a number of activities, the completion of which should bring along a more efficient cooperation between child welfare specialists, improvement in the quality of positive and reactive measures, which, in turn, should result in the increased welfare of children (incl. children with special needs) and in more adequate satisfaction of children's needs. The strategy also brings out short-term objectives (satisfaction of the child's basic needs, satisfaction of the child's special needs, and the child's need for the support of the family, community and environment).

Henberg (2003) has criticized the strategy for non-inclusion of the following: the establishment of the systems for monitoring the rights of the child; the solution of coordination issues in the field of child welfare; the solution of the problems of underage offenders and minors in custodial institutions; the solution of the problem of child welfare specialists' professionalism; and the solution of the problem of planning national and local resources. The overall welfare of children can be improved and the services directed at children developed only if children and all issues connected with children are a priority in the budgetary policy and special attention is paid to these during the process of drafting the budget. In Estonia, before the state and local government budgets are approved, their potential effect on children is not evaluated in detail.

The Republic of Estonia Child Protection Act (1992), passed 8 June 1992 and entered into force 1 January 1993, provides for the internationally recognised rights, freedoms and duties of the child and protection thereof in the Republic of Estonia. The act provides the basis for other legislation of general application of the Republic of Estonia concerning child protection (§1). Child protection is based on the principle that the best interests of the child shall be a primary consideration at all times and in all cases (§3). It mentions the rights (§8-

16) and duties of a child (§18-23). According to the act, the natural environment for the development and growth of the child is the family. Families with children shall receive protection and support from the state (§24). The child and his or her parents shall not be separated against their will except if such separation is in the best interests of the child, if the child is endangered and such separation is unavoidable, or if such separation is demanded by law or a judgment which has entered into force (§27). One of the important aspects of child protection – to fight against violence – is mentioned in the section of treatment and punishment of a child. It is prohibited to humiliate, frighten or punish the child in any way which abuses the child, causes bodily harm or otherwise endangers his or her mental or physical health (§31). It is prohibited in the Republic of Estonia to manufacture or sell toys which imitate objects used to destroy people and other living beings (§48). Child sexual abuse is prohibited for adults in following activities (§33): inducement of a child to engage in sexual activity; exploitative use of children in prostitution; exploitative use of children for pornographic purposes. Every person is required to immediately notify the social services departments, police or some other body providing assistance if the person knows of a child who is in need of protection or assistance (§59).

The Child Protection Act mentions several crucial aspects concerning child protection - child's rights, duties, prohibition of violence but there is nothing written about the implementation, monitoring and assurance of quality. There are also not clear definitions written in the act. Although the past demographic and social changes have had an impact on the present situation, while the political changes with economic and social consequences are creating serious welfare problems for children and their families, during this fifteen years since Child Protection Act was entered into force, no major changes have been made in the act. In 1996 §5 was added about state child protection (state child protection is legislative, investment and supervision activities financed from the state budget and the social fund for the organisation of children's health care, education, work, rest, recreational activities and welfare). The same year inadmissibility of promotion of violence (§48) was written in the legislation; also organisation of guardianship and curatorship (§63) and adoption (§66) - the legal basis for the organisation of guardianship, curatorship and adoption is provided by the Family Law Act. Since 1 May 2004, the teachers and educators of children with

special needs shall comply with the requirements established by law or pursuant to law and be suitable for such employment (§42).

At the end of 2004 the concept of child welfare was initiated by the Ministry of Social Affairs and approved by the Government of the Republic on 27 January 2005. One of the objectives of the concept is to create a system for managing the protection of the child's rights, and to propose necessary changes in the legislation (mainly for the Child Protection Act) providing for and regulating the rights and protection of the child. Another objective is to harmonize the practice of child protection work across Estonia to ensure high-quality help according to standards for the child and the family in the whole country.

The concept is guided by four main principles common to all child welfare measures and activities: (a) The principle of subsidiarity; (b) Graduated services; (c) Partnership with families; and (d) Case management and the use of networking as main methods in child protection.

The abovementioned principles are not new, but local governments have not been able to adhere to the principles on following reasons (Rääk 2004): (a) rural municipalities and towns lack child protection officials (the latest data is from the year 2005 – 153 child protection workers, *Alaealiste kuritegevuse vähendamise arengukava aastateks 2007-2009 2007*); (b) not all the child protection workers have professional education (According to survey carried out in 2006 among social workers who work with children and families, almost half – 42% – the respondents had higher education in social work, 12% were acquiring education in social work at the time the survey was conducted and 46% did not have higher education in the given field, Lai 2007); (c) services for children and families with children are underdeveloped; and (d) the volume and quality of services do not satisfy the needs of children and their families. Because of heavy workload, welfare workers do not have enough time to motivate and counsel the families, to manage the case consistently, to be responsible for it from beginning to end, nor to use all the resources in case network to the full extent.

Child protection concept stresses the need to guarantee counselling, conciliation and support person services to all the families that require these services; to develop children's rehabilitation and nursing treatment systems; to organize the provision of disability specific services by the state; to expand the right to rehabilitation service to

children with behavioural problems; and to legalize the provision of healthcare, welfare and educational services in half-closed institutions to children with behavioural problems as one way of offering rehabilitation service.

Local governments and the state are obliged to adopt measures to ensure that each child's problem is discovered in due course and needed help is provided. The success of child and family policies guarantees cooperation that is goal-oriented and coordinated between the different parties that is necessary for the strengthening and protection of children and families with children. The purpose of a new Child Protection Act (should have been implemented in 2007 but the process has stopped) is to ensure the internationally recognized rights, freedoms and duties of the child and protection thereof in the Republic of Estonia. The Act would provide a basis for other legislation of general application concerning child protection in the Republic of Estonia.

Family Law Act (1994), was passed 12 October 1994 and entered into force 1 January 1995. The act stipulates equality of rights and duties of parents (a parent is required to protect the rights and interests of his or her child, §49), removal of child from parent (at the request of a parent, guardian or guardianship authority, a court may decide to remove a child from one or both parents without deprivation of parental rights if it is dangerous to leave the child with the parents, §53), deprivation of parental rights (at the request of a parent, guardian or guardianship authority, a court may deprive a parent of parental rights if the parent: (a) does not fulfil his or her duties in raising or caring for a child due to abuse of alcoholic beverages, narcotic or other psychotropic substances, or other reason which the court does not deem to be persuasive; or (b) abuses parental rights; or (c) is cruel to a child; or (4) has a negative influence on a child in some other manner; or (5) without good reason, has not during one year participated in raising a child who resides in a child care institution, §54) and restoration of parental right (at the request of a person who has been deprived of parental rights, a court may restore parental rights with respect to a child if the person has improved his or her conduct, and desires and is capable of exercising parental rights as required, §56).

Social Welfare Act (1995) passed 8 February 1995 and entered into force 1 April 1995. This Act provides the organisational, economic and legal bases of social welfare, and regulates the relations relating to social

welfare (§1). Act stipulates following social services for children and their families (§10): counselling, rehabilitation service (on the basis of a decision of a juvenile committee), childcare service, foster care, care in social welfare institutions (§18). Types of social welfare institutions are: (a) day centres; (b) shelters; (c) substitute homes; (d) youth homes – institutions established for living and rehabilitation for youths over the age of fifteen who are from substitute homes, schools for students with special needs, residential educational institutions or have been left without parental care; (e) residential educational institutions – institutions established for living, care, development and education for disabled school-age children); other social services needed for coping

There is lack of services for children and families in risk. Although the Social Welfare Act gives some guidelines for the separation of the child from the family, it is often conducted without previous help and support of the family (Haljasmets 2008).

In child welfare legislation very little focus is given to preventive work. In the strategy for the ensurance of child's rights (2003), it is mentioned that preventive measures and prevention work is crucial with young people living in risk and with socially unacceptable behavior. Concrete action plan is missing. The concept of child welfare (2004) stresses the need for prevention work in human trafficking and child prostitution.

Pardeck (2006), Watson and West (2006) have stated that promotion of positive change for service users and their families is achieved by well-being through targeted services. The challenge is to identify accurately and sensitively those families who may require services, and to ensure that children and families receive an appropriate service which results in good outcomes for children (see Cleaver, Walker, Meadows 2004). According to survey with child protective workers (Haljasmets 2008), it seems that waiting list for services are long and some needed services are missing completely or partially, f.e rehabilitation services for parents with alcohol and drug addictions. There are also shortcomings in the quality of service delivery and the provision of help is depending on the location of the child (different possibilities of local governments). Welfare services and family support must be at the core of prevention strategies for children at risk and in care. Primary prevention refers to strategies and programmes, which aim to stop significant harm to children before it occurs (Gudbrandsson 2004). There

is a lack of consistent assessment system of the child (to address comprehensively all dimensions of child development) in Estonia. No strategy or legislation is giving guidelines/framework for the assessment of the child and family.

The question is about providing a framework through which to improve the management and delivery of children's services. Lindsay (2004) points out that services are often focused on saving children rather than on strengthening families. This can be also said to Estonian child welfare system. Attempts to establish a better link between the objectives of the child protection system and the outcomes for children and their families have failed. There is a question of pursuing the goals for social protection and inclusion for families with children.

Conclusions

The aim of this article was to analyse the extent to which Estonia has developed policy and implementation of the child welfare. The context of the article was provided by reviews of national (and) international literature, legislation and documents concerning child protection.

Since 1990 the number of households with children and children population in Estonia has been decreasing due to reasons of negative birth rate on the transition period of market economy. Although the proportion of the poor has decreased last couple of years in all age groups, the relative-at-risk-of-poverty rate has remained at the level higher than the Estonian average among children aged 15 and less.

The incidence of children registered as first time „clients“ has been increasing, also the number of children taken into public custody. Last four years there has been more demand for social welfare institutions for children due to unstable economical situations at home that results neglect and abuse of children. The number of children living at risk families has been increasing and at the same time the implementation of foster family care model has not been successful.

Child welfare legislation is needed to be improved, according to the needs of the families in today's society. Until today the Government has been inactive in implementing the Child Protection Act. The generality of this law has determined the difficulties in its implementation, which is why the mentioned law has encountered little actual use – e.g. very few references have been made to the law in legal

proceedings. The current child protection system has limitations for providing help needed accordingly to the special situation of the child and the family.

One of the crucial aspects which needed to be considered – requirements for the quality assurance mechanism to improve service delivery.

In the last decades, Estonia has lived through great and rapid changes, and primarily concentrated on general economic indicators. Unfortunately, many people, primarily families with children, have not been able to cope with and adapt to these societal changes and therefore the number of people needing the help of social works is increasing. Today, the opportunities for helping families to cope is better than years ago, however, often the links between child protection system and various assistance measures are missing.

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SOCIAL WORK AND COMMUNITY-BASED SOCIAL ECONOMIES. REFLECTIONS ON THE TASK OF SOCIO-POLITICAL DEVELOPMENT

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Abstract:

The international discourses on social economy as well as its existing local forms are drawing more and more public attention as alternatives to the neo-liberal ideology and practice, which is increasingly subject to crises. Regardless of their different forms and contexts from which they have emerged, they show distinct similarities.

Social economy comprises a broad field of organisations and movements that employ economic means in their quest for independent, civil-society based solutions, complementary to government-driven and market-driven solutions. They can occur in the form of cooperatives, foundations, public-private partnerships, community services, in various areas of the informal economy, as welfare organisations, as ethical investment, savings, or credit institutes, or 'fair trade' organisations. This field of complementary and alternative forms of economic organisations is where, to a large extent, the potential for sustainable development lies. This area, according to analysts, is particularly suitable for generating solutions for the central issues of present and future.

In their existing forms, approaches that pursue the idea of social economy are based on fundamental human and social needs and the necessities of nature. From this point of view, economic activity is predominantly to be considered as a reproductive function for people and communities. It is about the preservation and sustainable organisation of the basics that people need in order to exist and live together in communities. A roof over their head, property, gainful employment to earn a living, an appropriate infrastructure, health services, clean water, and more, are among these things.

Social Economy can develop results from organised forms of resistance against the destruction of our basis of life. This is the band that ties the movement of landless people in Brazil, the movement of women for the preservative use of land and biodiversity in India, the union of working children in Latin America and South Africa, the movements against the privatisation of public services in Europe, or critical consumer campaigns from every region of the world, together. Association and socio-economic self-organisation are also types of reflexive acquisition of democratic rights in an economy or

society, and of defending these - sometimes even in conflictual processes that are linked with experiencing empowerment and that strengthen the sense of democracy.

Keywords: civil society, social work, community work, socio-economy, employability

Never before since the dawn of industrial modernity have the social risks and the threat to people's survival and bases of life through a hostile economic system been as far-reaching as today. The socio-political issues of today are highly complex. They imply the necessity for sustainability and social development of the global society.

And in times when the dominating economic system is increasingly turning against societies and their weakest members, it has become a necessity to rearrange the relationships between social work and the economy. Under such conditions, social work must achieve more than merely to flank the market, it needs to create and defend complementary and alternative structures within civil societies.

Social Work and the Economy - A Troubled Relationship

Social movements for civilian rights enforced the socio-political conditions that protect the working population in Western industrialised countries against the societal risks it has been exposed for the first time in history since the beginning of the 20th century. The laying-down of socio-political rights and professional social work with individuals, groups and communities that emerged in consequence were a significant step in the evolution of societies.

The role of the market was to ensure economic value creation and to integrate humans by making them part of the labour force. Governmental policies were intended to take care of the distribution of values, and of corrective action in terms of market access and market performance. The taxation of commercial enterprises served the purpose of financing societal responsibilities such as education, public infrastructure, culture, social work and the health system, whereas social health and security systems were meant to ensure the security of the labour force. Social (re-)integration was one of the tasks of professional social work. This division of labour in a "social market economy" left social work with merely flanking and stabilising tasks that lie outside the actual field of economics. But it has not gone unnoticed that, over the

past decades, the parameters for this model of industrial modernity have been turned over under the influence of the epochal changes that “neo-liberal globalisation” has brought about. I will not revisit the details of the factual political and economic changes and the underlying neo-liberal ideology at this point.¹ However, it is immensely important to me to point out that the practice of social work, and of education and training for social work, do not sufficiently reflect these fundamental changes and their underlying conditions, even though social and economic sciences have described and highlighted the changes and their consequences for decades.

Recent scientific discourse on the relationship between social work and the economy has been limited to the requirements of creating market-driven social services and the issue of applying the instruments and standards of business management to social and health services. A comprehensive perspective on the creation and distribution of values in societies, on participation of a society's members in the societal wealth it has created, and on the positioning of social policy and social work in this context, is blanked out. Even where more recent socio-political programmes² talk of supporting the “local economy”, this does not also imply that they have given up the outdated segregation of economic and social aspects. In European states, the relationship between social work and the economic system is largely reduced to accompanying and complementary measures of employment policy, ensuring employability and promoting “soft locational factors”; professional actors of social development do not interpret the mission statement of promoting “local economies” by applying the logic of communities and the people in a community, or by applying the requirements of sustainable development, but by applying conventional business development criteria.

In view of the new forms of plunder and expropriation in societies, of the infringements of social, ecological and economic human rights, and the destruction of the natural bases of life, new, integrated approaches are required in social policy and social work, approaches that encourage local, demand-driven economies in the context of social

¹ Elsen, Susanne: *Gemeinwesenökonomie*. Neuwied 1989; and Elsen, Susanne: *Die Ökonomie des Gemeinwesens*. Weinheim and Munich 2007.

² e.g. EU-programmes such as URBAN, LEADER, EQUAL or the joint programme “Die soziale Stadt” between German federal government and the Länder.

action. And the process of creating options for independent development needs to be supported through the instruments of social policy.³

This claim, and correlating action, is by no means new. There is international consensus in terms of the theory and practice of community development that local and demand-driven economies are a central prerequisites for the independent existence and sustainable development of communities, and the theoretical roots of community development as an approach to social policy and structural social work do not ignore economic aspects as a central area of life either.

Social economy in communities - idea and normative claim

Considering the consequences of neo-liberal globalisation and the changing structures of gainful employment, socio-political considerations needs to pay much more attention than before to the local living space as a place of active participation and integration, of collective self-organisation and sustainable development, without abandoning each individual's rights to social services. Shaping social development⁴ has to be about more than just securing livelihoods in terms of securing the life bases of those who have become "dispensable" through technological and economic change, but about economic activity as an expression of social action which takes the preservation of the ecological and social bases of life⁵ into account.

Shaping sustainable social development raises questions about the logic behind socially integrated economic activity geared to maintaining the capacity for social, cultural, ecological and economic evolution. Economic activity, seen from this perspective, needs to be considered as driven by the requirements of individuals and communities. It is about quality of life, about the fair distribution of the values created, about a

³ Lutz, Ronald (ed.) (2005): *Befreiende Sozialarbeit*. Oldenburg 2005, p. 18.

⁴ Elsen, Susanne/Lange, Dietrich/Wallimann, Isidor (eds.) (2000): *Soziale Arbeit und Ökonomie*, Neuwied.

⁵ cf: Duchrow, Ulrich/Hinkelammert, Franz Josef: *Leben ist mehr als Kapital*. Oberursel 2002; Ulrich, Peter/Maak, Thomas (eds.) *Die Wirtschaft in der Gesellschaft*. Bern/Stuttgart/Vienna 2000; Mander, Jerry/Goldsmith, Edward (eds.): *Schwarzbuch Globalisierung*. Munich 2002.

self-determined life and our relationship with nature.⁶ Every project with such a claim is contradictory to the overpowering financial interests that rule the economy and societies, and even people's thought patterns, today.

Given a closer look, it shows that the term “community” implies the goals, principles of coordination, and limits to this kind of social economy. The concept of a community-driven economy is based on the following fundamental implications of the concept:

1. The inextricable entity of use, creation, and distribution of the material bases of life.
2. The shaping of socio-cultural life nexuses through forms of vertical collectivisation based on association and voluntary action.⁷

The idea and claim of social economies in communities as well as its existing forms are always alternative socio-economic concepts to the dominance of financial interests, the focus on self-interest, and the fixation on competition.

In their existing real-life forms, approaches that pursue the idea of a community-driven economy are based on fundamental human, social, and ecological needs. From this point of view, economic activity is predominantly to be considered as a reproductive function for people and communities.⁸ It is about the preservation and sustainable organisation of the basics that people need in order to exist and live together in communities. A roof over their head, property, gainful employment to earn a living, an appropriate infrastructure, health services, clean water, and more, are among these things.

What we are seeking to find through social economies in communities already exists - and has always existed - in the shadow of the dominant economy, and it is currently re-emerging all over the world. In the international discourse, these approaches are currently drawing

⁶ Wendt, Wolf Rainer (2000): Bewirtschaftung des Sozialen. In: Elsen, Susanne/Lange, Dietrich/Wallimann, Isidor (ed.): Soziale Arbeit und Ökonomie. Neuwied, p. 67.

⁷ Further discussions on the topics mentioned here in: Elsen, Susanne: Die soziale Ökonomie des Gemeinwesens. Eine problemorientierte Einführung. Weinheim and Munich 2007.

⁸ Wendt, Wolf-Rainer (2000): Bewirtschaftung des Sozialen in Humandiensten. In: Elsen, Susanne, Lange, Dietrich/Wallimann, Isidor (ed.): Soziale Arbeit und Ökonomie. Neuwied, p. 67.

more and more public attention to themselves as alternatives or complementary structures to the current neo-liberal practice, which is increasingly subject to crises. Regardless of their different forms and the different contexts from which they have emerged, they show distinct similarities, and the attempts at conceptualising these make it clear that they constitute real alternatives to the western growth model and neo-liberal profit model.

In order to understand the potential of these approaches for the further development of work in and on communities, their specific adaptations in community work and the social economy, and the concepts that are tagged as “local economies”⁹ in current socio-political discussions in the German-speaking part of the world, need to be expanded. Development opportunities arise within the broader context of socio-economic self-organisation, which is integrated into civil societies as a concept of a formative social policy that has the capacity to bring up options for disadvantaged people and communities as well as being a step in the direction of sustainability.

The European discourse is based on the idea of a social economy in the “third sector”¹⁰, which contains a variety of organisations that act beyond the public and private sphere and whose main objective is not the maximisation of personal profit. Their central issue is not the generation of profit, but its distribution - and this is what sets them apart from forms of management that are driven by private capitalism. Besides clubs, foundations and mutual societies, this also includes cooperatives.¹¹ In the Euro-Romantic area, the term “*Économie Solidaire*” - in delimitation from the insurance industry and traditional welfare services - is used for cooperatives and other forms of economic self-organisation.¹² The term “solidarity economy” prevails in the global discourse; in particular, the

⁹ This term is used in almost all programmes for employment-related solutions in rural and urban regions in crisis (e.g. the “*Soziale Stadt*” programme); Elsen, Susanne (2005): „Lokale Ökonomie” als Strategie der Beschäftigungspolitik? In: *Forum Sozial*. Issue No. 2, 2005, p. 30f.

¹⁰ The *Économie Sociale Charta* adopted in May 1982 contains seven paragraphs that set forth the principles for the coordination of the sector.

¹¹ Elsen, Susanne: *Bürgerschaftliche Aneignung gegen die Enteignungsökonomie*. In: *SOZIALEXTRA* 28th volume, issues 7-8 2004, p. 42-49.

¹² There has been a Secretary of State for this sector since 1999 in France.

term was influenced by the developments and discourses of the “*economía popular y solidaria*” in Latin America.¹³

Solidarity economies transgress the boundaries of states and markets, and originate in civil society. This is what lends them the ability to create new opportunity structures and solutions that are tailor-made to meet specific demands. Their potential lies in an extended logic of action in an intermediary sector, and in the effect that civic involvement has on people's own lives as well as common concerns.

The term “solidarity economy” emphasises the significance of solidarity as control medium¹⁴ that opens up the actors' willingness to take on extra-functional responsibilities in economic transaction processes and that generates integrated perspectives.¹⁵

Solidarity economies counterbalance the dominance of profit and competition as single control instruments for economic activities. Solidarity economies are controlled through solidarity, and generate social capital through cooperation and the joint management of resources.

They are not merely part of a social sector that corrects inadequacies and failures of market and state, but rather, it is an independent logic of economic action with a social objective, something that is particularly apparent in cooperative solutions. Solidarity economies are characterised by voluntariness, solidarity, cooperation, democratic organisation, association, self-organisation and a focus on common good as their principles of action. The function of (monetary) capital is to serve these purposes. Solidarity economies cannot survive without the inflow and lasting effects of social capital - by means of the 'solidarity resource - as they have to resist the powerful influences of the market¹⁶ with a logic of their own and often in spite of restrictions in terms of insufficient funding.

Solidarity, however, is often limited to the members of a community, which excludes others - and this is an indicator for the

¹³ Elsen, Susanne: (2007), p. 159 et seq.

¹⁴ On the significance and effects of solidarity as a control instrument, cp: Habermas, Jürgen: *Die neue Unübersichtlichkeit*. Frankfurt am Main 1985 p. 158.

¹⁵ Elsen, Susanne(1998): *Gemeinwesenökonomie*. Neuwied p. 95-122.

¹⁶ Birkhölzer, Karl/Klein, Ansgar/Priller, Eckard/Zimmer, Annette (2005): *Theorie, Funktionswandel und zivilgesellschaftliche Perspektiven des Dritten Sektors*. In: Birkhölzer, Karl/Klein, Ansgar/Priller, Eckard/Zimmer, Annette (eds.): *Dritter Sektor/Drittes System*. Wiesbaden, p. 10.

limitations of the approach. Becoming aware of the global interdependencies and the common interest in preserving the basis of life for everyone could resolve tendencies towards particularity and closure¹⁷ when it comes to solidarity-based action in local communities. The concept of the community economy is thus based on an understanding of solidarity that expands beyond the local and temporary context and claims its universal validity for the global society. A solidarity economy does not only emerge from adversity or out of sympathy, but from the realisation of life-threatening and unfair conditions and the discernment that there are no “others” in a globalised world, as the global society shares an ecological and social fate. Globalised solidarity thus stems from the knowledge that we are part of a social and ecological whole, and the strength it can develop results from organised forms of resistance against the destruction of our basis of life. This is the band that ties the movement of landless people in Brazil, the movement of women for the preservative use of land and bio-diversity in India, the union of working children in Latin America and South Africa, the movements against the privatisation of public services in Europe, or critical consumer campaigns from every region of the world, together.¹⁸ Association and socio-economic self-organisation are also types of reflexive acquisition of democratic rights in an economy or society, and of defending these - sometimes even in conflictual processes that are linked with experiencing empowerment¹⁹ and that strengthen the sense of democracy.

The normative premises for community economies are, at the same time, also kinds of strategic behaviour. The following criteria are common to solidarity economy movements around the world:

1. Democratic organisational culture (democratic vote “one person, one vote”)
2. Inclusive ownership (use ownership)
3. Activity driven by need (not primarily focused on profit)
4. Profit appropriation (for defined purposes)
5. Social integration

¹⁷ Elsen, Susanne (1998): l.c., p. 100.

¹⁸ An in-depth description of the diversity of these associations and their development is given in: Elsen, Susanne (2007): l.c.

¹⁹ Elsen, Susanne (2003): Lässt sich Gemeinwesenökonomie durch Genossenschaften aktivieren? In: Flieger, Burghard (ed.): Sozialgenossenschaften. Neu-Ulm p. 57f.

The organisation principles set out by the international movement for cooperatives one hundred and fifty years ago are the basis for this. Lack of capital is and always has been the main motivation for cooperative work. The concept of community economy foots on an extended interpretation of the term labour, based on a broader perspective on meaningful work for a society, covering neighbourhood work, family work, and personal contributions, barter, subsistence economies, work in cooperatives, gainful employment and forms of civic involvement.

The central concept of “community” is derived from the idea of a community of equals based on mutuality. Consequently, it also implies ideas of reciprocity - these are the concepts of reciprocity and fairness that govern acts of exchange, based on equality, between people. The redistribution process is aimed at correcting the unequal distribution of goods and access, and thus at the mitigation of social injustice, because only the fair distribution of goods make reciprocity and equivalence possible in barter deals and contractual agreements.

Consequently, community-based social economies (community economies) should always be considered in the context of a formative social policy that grants disadvantaged groups the right to claim extensive rights within the civic society.

“Common good” and “access for all” are the essential foundations of community-based work. Access for all refers to granting each member access to the central prerequisites of work and life. This kind of access has a defined operative value, but it is also a normative value and assumes differentiated concepts of ownership. Social community economy is based on both collective and individual ownership, and creates sustainable and emancipatory types of ownership through different kinds of solidarity economies.

Community economies as a real utopia

The “community economy” concept is not a standardised position in economic sciences. Its occurrence is both normative and a phenomenon that has occurred in a variety of ways in the past²⁰ and is currently appearing in various shapes and forms across the globe. The history of community economies as a contrasting concept to the capitalist

²⁰ On the history of community economy concepts: Elsen, Susanne (1998): l.c., p. 64f.

approach can be traced back more than two hundred years. There have always been people who counterbalanced the dominant economy with such concepts of a real utopia, and who claimed more social justice and responsibility for communities.²¹

Until today, examples of this can be seen in places where people take on meaningful and essential tasks in communities, where people develop forms of escaping the constraints of capital through subsistence economies and barter trade, where cooperatives act as alternatives to commercialisation and the expropriation of people's basis of life, and where people develop models of solidarity economies collectively or together with - and for - those who are in need of their solidarity. These complementary and alternative networks act collectively and co-operatively. They are based on a holistic view, and, like those of the historic pioneers Robert Owens or the Rochdale Pioneers²², they economic concepts based on the idea of community.

When I talk of “community economies” as an option of for the development sustainable social policies, I am referring to concepts of socio-economic self-organisation in the context of civil society, of organised forms of solidarity or parties that support socio-economic approaches to securing people's livelihood, to integrating and emancipating disadvantaged people, or to preserving the basis of life in communities. Such organisations are based on association, voluntariness, and (are supported by) self-organisation, but commercial interests and/or paternalistic social work do not dominate them. It is a prerequisite that they extend the scope of action options for disadvantaged actors without harming the good of the community.

Cooperatives as a means of organising labour and the organisation and control of public services bear particular potential for solving social problems with economic means.²³

²¹ Elsen, Susanne (2003): l.c. p. 57 f.

²² 150 years ago, the “Rochdale Pioneers” set forth the operative principles for cooperatives based on common use ownership, which apply until today.

²³ Elsen, Susanne: Lässt sich Gemeinwesenökonomie durch Genossenschaften aktivieren? In: Flieger, Burghard (2003): Sozialgenossenschaften. Neu-Ulm, p. 57-78.

Recent examples and an attempt at their explanation

Community economies around the world have always emerged - and still do so today - out of lack of other means of securing one's livelihood and socio-economic participation, or as an explicit and reflected alternative concept to infringements through the globalised market economy. Traditional forms that resemble the logic of a community economy are still the most important basis of people's livelihood in poor or underdeveloped regions of the world. As a reaction to infringements through transnational enterprises, new and reflected alternatives are currently emerging not only in these countries. Faced with a deepening rift in society, the political and economic organisational abilities of the poor and marginalised groups in transforming and developing countries are increasing. The reflections of globalisation-critical groups and increasingly harsh acts of infringement and expropriation are making it more and more obvious that many are affected by the same situation, and the cohesive power of defensive and pro-active movements is growing stronger.

New forms of social distortion on the one hand and the growing influence of the alternative globalisation movement on the other act as the driving forces of movements for controlled and socially integrated economic activity. The current hunger crisis can be attributed to the policies of the IMF, WTO and World Bank, policies that have ruined traditional subsistence economies in the local markets of transforming and developing countries in favour of monoculture and an orientation towards export and global markets. Acts of speculative land expropriation through the agro-industry are becoming increasingly aggressive, especially in Latin America, due to the high demand for animal foods for the production of meat and due to the production of diesel for the agricultural sector. A global civil war is forming, with a focus on Asia and Latin America, against the genetic piracy associated TRIPS agreements²⁴, which are driving people all over the world to poverty and dependency and which destroy cultural and biological diversity²⁵. The credit crunch, which has demonstrated the societal dangers that lurk in the international finance markets repeatedly within a short period of time, is a tailwind for movements that criticise our pecuniary logics and interest

²⁴ TRIPS Programme of the WTO "Trade in intellectual Property Rights".

²⁵ c.f., in particular, Vandana Shiva's work.

mechanisms. Actions to preserve public services (housing, water, public infrastructure, etc.) are a reaction to the privatisation imperative that the WTO has set out in its GATS agreements.²⁶

The growing importance of solidarity economies as alternative or complementary structures is particularly visible in the current developments in Latin America and in the discourses on the significance of solidarity-based economic activities for a different modernity that are held there. The phenomena we currently see emerging all over the world - or that have always existed, but that are currently moving more into the centre of attention - can basically be regarded a part of the tradition of “popular economies” - or “*economía popular*” - that have existed as a complementary or alternative practice to the dominating form of economy for centuries.

But, as they did 100 years ago, people in the industrialised countries - where such forms of economic self-organisation have been extinguished from collective memory - are now increasingly returning to these concepts of securing the core requirements of life. In welfare states, self-help is a last resort that people only turn to in times of a drawn-out crisis, when all other options have been exhausted. Economic self-help activities are currently taking place in the fields of labour, preservation of public services, strengthening of local and regional economies, and local control over money.

In the industrialised countries, cooperative businesses are currently being founded in the following sectors:

1. Employee-owned companies that are founded as alternative ways of organising labour in the industrial economy, aimed at securing gainful employment locally by taking over businesses as cooperatives.
2. Cooperatives as forms of alternative local employment policy, with women and men who suffer disadvantages in the employment market (Cooperatives to ensure livelihood). The *Cena et Flora* cooperative “ in Riesa ²⁷ is worth particular mention in this respect.

²⁶ GATS Programme of the WTO “General Agreement on Trade in Services”.

²⁷ Spain passed a law reform in order to promote the foundation of micro-enterprises as a way out of unemployment.

3. Productive cooperatives in which mainly highly-qualified professionals join forces to improve their chances on the market, e.g. technical engineers or IT specialists who are having difficulties to find secure jobs in the public sector, or productive cooperatives of medical professionals (intellectual capital cooperative).
4. Social, educational, cultural, and health cooperatives whose aim is to counteract cutbacks and the downgrading of service quality in these fields through privatisation. These cooperatives are founded by those who offer or use these services and, as alternative socio-political solutions, sometimes receive public funding. These forms of cooperation also need to be considered as emancipation of their sponsors or users (independent living) as the foundation of such a cooperative rids its founders from incapacitation through “experts”. Italy is an impressive example for the development of cooperatives with a social objective.
5. Consumer and customer cooperatives, which emerge along the borders between cities and regions, as a consequence of scandals surrounding the industrial production of food. “Tagwerk”, a cooperative from the region north of Munich, is a convincing example.
6. Cooperatives and funds within the local population to protect public infrastructure and public services (housing, energy, water) against commercialisation. Multi-stakeholder organisations are particularly suitable in this field as well as in the field of educational, social and health services.²⁸ Such forms of “privatisation by collectivisation” are a serviceable alternative, especially when it comes to the privatisation of public services. Foundations of local cooperatives and civic funding in social, health, school and care services in Finland, Spain, Canada, Italy, and Japan come as the local population's

²⁸ Fritz, Thomas/Scherrer, Christoph: GATS: Zu wessen Diensten? Hamburg 2002.

- response to privatisation, commercialisation and expropriation of public institutions and services.²⁹
7. Endeavours to gain local control of money by means of alternative or complementary currencies, local banking cooperatives or investment funds³⁰ in order to promote local value creation and social integration. The extent and scope, the variety and quality of approaches taken in Japan are particularly worth notice. A broad range of local complementary currencies, barter systems and cooperative companies, based on forms of professional organisation, has developed within civil society³¹. They depend upon extra-familiar alliances and are based on the mistrust of market, state, and the value of money. Under the responsibility of civil society, they create sustainable alternatives to these by bundling skills and resources and by non-monetary trading. The *Süddeutsche Zeitung* described this phenomenon as the “social flight of capital”³². In Japan, cooperative-based communal solutions have been developed, mainly in the fields of health care and nursing, combining mutual help, self-help, non-monetary trade and professional help.³³
 8. Movements for the appropriation and self-determined use of ground and for reactivating subsistence options in cities are particularly common in Japan. There are even radical groups, which call themselves the “garden guerrilla”. However, the trend towards urban gardening or community gardening for social, cultural, or therapeutic reasons or for local economic or ecological purposes can be seen in almost all regions of the world, even in Europe and the German-speaking regions.
 9. Fair trade and fair investment initiatives and the control of government procurement processes in terms of their social and

²⁹ Göler von Ravensburg, Nicole: Genossenschaften in der Erbringung Sozialer Dienste. In: Flieger, Burghard (ed.): Sozialgenossenschaften. Neu-Ulm 2003.

³⁰ Eine Dokumentation gemeinwesenorientierter Geldsysteme in: Elsen, Susanne: l.c. 2007, p. 218 et seq.

³¹ Lietaer, Bernard A.: Das Geld der Zukunft. Munich 2002, p. 324 f.

³² *Süddeutsche Zeitung*, 7th Jan. 2003.

³³ Göler von Ravensburg, Nicole: Genossenschaften in der Erbringung Sozialer Dienste. In: Flieger, Burghard (ed.): Sozialgenossenschaften. Neu-Ulm 2003 p. 82.

ecological compatibility have come out of the niches they were previously restricted in only five years. These initiatives, which are often linked to promoting independent local cooperatives in developing countries, are also an investment into social capital that build bridges between the rich and poor parts of the world, and can even be regarded as community work in the global community. The work of the Nord Süd Forum in Munich is a good example of this.

On the significance of socio-economic self-organisation for societies

Every alternative or complementary economic activity has social and socio-political significance, and indicates a profound break with neo-liberal ideology and practice. There are six strongholds of such alternative concepts, all of which the traditional economy also claims for itself:

1. the general organisation of all economic concerns in markets,
2. the utilisation and management of public, cultural, intellectual and biological goods in markets,
3. the conditions of utilising labour,
4. the power of making decisions on economic participation or exclusion,
5. the definition of prices for all these goods,
6. the definition of the logics of money,
7. the organisation of social services as a system that is external to the economy in order not to compromise economic interests.

There are different conclusions one can draw from the emergence of these new associative socio-economic structures and networks all over the world: not least, they are a sign of the transfer of participative democracy to the economic sector - not only to the political sector - and of the consequences responsible citizens are drawing from the realisation that the dependencies and weaknesses of politics and the infringements and irresponsibilities by the economic system require drawing a line and providing sustainable alternatives.

Apart from those kinds of “popular economies” that arise from adversity, it is important to pay attention to those kinds that emerge as a reflected alternative to social distortion or as a responsible step towards a sustainable society. These economies are characterised by their actors' motivation, which is a different from the accumulation of wealth. The

modernisation theorists Hans Loo and Willem van Reijen described these economies as alternative concepts to the market economy of post-industrial societies, and as experimental ground for a new kind of local economy which is organised by laypersons in connection with social movements.³⁴ These “amateur entrepreneurs” are also part of the “anti-productive alliance” described by Jürgen Habermas, of the movement of “growth critics' dissidence” that aims to strengthen the vital foundations of life-worlds against the momentum of subsystems that are driven by administrative powers and money through forms of self-organisation at grassroots level.³⁵ They have the critical awareness that makes them an ally of socio-economic innovation in favour of socially disadvantaged groups.

“Old”, pre-modern models of a plurality economy, which survived in periphery regions of the world before the market economy replaced them completely, or existed in poverty economies of indigenous populations or welfare states, can be carried over into “new” forms.³⁶ For a few years now, as the social movements from around the world are linking up, the residues of pre-modern economic activity have been stepping out of their shadow existence and have gained an understanding of themselves as alternative concepts to neo-liberal expropriation. In either case, the pre-modern or the new, the actors do not expect a solution to come from the “cathedrals of economic, scientific or governmental power”³⁷. Rather, they have identified them as part of the problem's cause.

The knowledge about cooperative forms of economic self-organisation, which originates from other parts of the world, is still a learning context for developing a formative social policy that promotes civil society-based solutions. Sustainable “progress” can mean “regress” in terms of socially integrated economic activity. Oskar Negt comments on this as follows: “One should not seek alternatives to the existing system in something that is radically different (...), but underneath the

³⁴ cf. van der Loo, Hans/van Reijen, Willem (1992): *Modernisierung*. Munich, p. 245.

³⁵ cf. Habermas, Jürgen (1985): *Die Neue Unübersichtlichkeit*. Frankfurt am Main, p. 156.

³⁶ Amongst these are, for examples, the economies of indigenous communities in the rain forests.

³⁷ Beck, Ulrich (1993): *Die Erfindung des Politischen* Frankfurt am Main, p. 158.

current conditions, their tangible forms and the individual trouble spots”.³⁸

The socio-political potential of mixed life-world logics

The potential for socio-economic innovation lies within the mixed logics of the “third” or “intermediary sector”.³⁹ Where the boundaries are blurred or there are ambiguities, as is the case for economic activity with a social objective, this results from the life-world context and its means of coordination, which create this kind of un-differentiation within, between, or outside of various functional areas. Life-world related issues and hardships, and the coordination of actions through communication, cooperation and solidarity, exceed the unambiguousness logics of economic and political systems. The extra functionality of voluntary commitment becomes an innovative capacity of its own. It stands for an openness that stretches beyond functional organisational systems, it stirs up the rationality of the logics of economic and political systems and engenders new combinations and closer-to-life options.

The emerging parallel and complementary economies are hybrid organisations that, transversal to the systems of society, pursue both social and ecological as well as economic goals, that act as if part of the economy, but are actually part of the organised civil society. Well established delimitations between private and public, political and social, or cultural and economic, are challenged by life-world based forms of limitation, appropriation and intervention.

The processes in which social movements intervene through forms of association and socio-economic self-organisation cross borders between the life-world and the political and economic sectors. Among other things, they also cause a de-monopolisation of sectors and expert knowledge, and introduce new actors and life-world logics to the state and market systems.

The foundations of cooperatives as socio-economic companies resulting from a life-world context are a mirror for the socio-economic transformation process in industrialised, transforming and developing countries. These foundations also emphasise the opportunities that result

³⁸ Negt, Oskar: *Arbeit und menschliche Würde*. Göttingen 2001, p. 405.

³⁹ “Intermediary sector” is a less hierarchic term to describe the organisational forms that range “in between”.

from process-like action on the lines of market, state, and civil society. The permeability of these lines and the resilience of the intermediary sector's mixed logics are central to the development and stabilisation of socio-economic concepts. Cooperative economies are the classic counterpart to capitalistic utilisation and expropriation. The recent developments in this respect should not be regarded as a backslide to pre-modernity, but as an anticipation of ways into a different modernity.⁴⁰ Their specific potential stems from the opportunity to combine powers, the tendency to disconnect from the market through management by members, and the principle of identification. Current examples from industrialised, developing and transforming countries illustrate the socio-political potential of an ancient type of social and local economic activity:

- In transforming and developing countries, the organisation of social and healthcare services in cooperatives is substituting care through family members, which is no longer a matter of course as traditions are lost and the conditions of living, working and lifestyle are changing. It is especially the women that are looking to new, collective forms of organisation to replace the traditional family care work.
- Cooperative organisations for public educational, healthcare and social infrastructure and services are substituting public providers in industrialised countries. Cooperatives for providing social, health and educational services are basically a re-privatisation of public services as the government is drawing out of its responsibility for this field. But this option contains the chance of preventing a purely commercial privatisation in favour of organisational models that are controlled by citizens and provide access for all. This model, however, should be considered as a socio-political instrument which expands the particularity of community-based solutions, and should be aimed at providing access for every citizen.
- Foundations of cooperatives in the economic sector have different roles: in developing and transforming countries, they can pave the way from the informal sector into the market. In industrialised nations they make it possible to tap into

⁴⁰ cf. Pankoke, Eckart (2000): Freie Assoziationen. In: Zimmer, Annette/Nährlich, Stefan (eds.): Engagierte Bürgerschaft. Opladen, p. 189f.

particularly labour-intensive segments of local markets or to organise local economic activity in a synergetic manner. Moreover, they are capable - under certain conditions - of stabilising and preserving conventional companies by turning them into cooperatives.

A full examination of these potentials requires abolishing prejudices, even within the critical left, and a serious examination of the conditions of the success or failure of collective economies. It is a demonstrable fact that, over the last 150 years, it was not only the lobby of the capitalist economy that rejected, drained or assimilated unconventional socio-economic projects to promote self-determination and self-government, but also the social democratic and orthodox Marxist labour movements.

Social movements, civil society and socio-economic development

The social movements for workers' rights, for disadvantaged and unpropertied people were fields of socio-political conflict in the 19th and early 20th centuries in western industrialised countries. The conflict potential that social innovations and alternatives can generate is also apparent in current social movements that act in a delimiting and formative way, whose actions expand beyond established government policies and capitalist economies, and extend their influence into the established political and economic systems.

The fact that they are both rooted locally and have international effects gives them an unprecedented quality. Like the social movements of the 19th and early 20th centuries, their attitude is anti-capitalist and collective⁴¹, and they are conceived as a new socio-political force with formative and limiting powers. A multitude of international organisations has evolved from the context of recent social movements; and while these organisations have the capacity for trans-national protest, it is their orientation towards local concerns that bears a great deal of potential for mobilising people and is a source of criticism of the current economic and political practice⁴².

⁴¹ Böhnisch, Lothar/Schröer, Wolfgang (2002): Die soziale Bürgergesellschaft. Weinheim, Munich, p. 14f.

⁴² cf. Roth, Roland (2001): Soziale Bewegungen. In: Otto, Hans-Uwe/Thiersch, Hans (eds.): Handbuch Sozialarbeit/Sozialpädagogik. Neuwied, p. 1669f.

Nicanor Perlas, the president of the Philippine-based Centre for Alternative Development Initiatives (CADI) and Right Livelihood Award laureate, places great hope in the power of civil societies, which have connected at local and global levels since the last part of the 20th century and are now making themselves heard, and counteract the forms of abuse, exploitation and destruction of our planet and humanity that we are experiencing today. “Civil society, in its present form, is the most important social innovation of the 20th century. Its significance equals that of the establishment of nation states in the early 17th century, or the emergence of modern market economies in the 18th century”.⁴³ Perlas defines civil society as one of the dimensions of the socio-cultural life-world, which represents specific roles, norms, practices, relationships and competencies. According to Perlas, these norms and practices of civil society - association, self-organisation, and organised communication - are not restricted to individual spheres of society, but take effect in political, social and economic contexts⁴⁴. He regards the growing strength of the civil society as a balancing third power and speaks of a redistribution of power between state, market and civil society. And in a society which has become unbalanced and contorted under the influence of neo-liberal globalisation, which has conceded defeat to a predominant market and has enslaved its other parts to the economy, he interprets this redistribution as a process towards the societal threefolding of politics, culture, and economy.⁴⁵

Perlas' conception of threefolding is not that of competing sectors, but of an integrative cooperation between politics, economy, and culture, based on citizen's critical commitment which advocates the concerns of society and nature. He sees socially and ecologically responsible economic activity as a global force to bolster the social dynamics of threefolding. De facto, the activism of civil societies around the world is making this novel concept of threefolding perceptible, but reflection upon and conscious description of the process are still in their early stages. A conscious policy of societal threefolding, however, would allow the

⁴³ Perlas, Nicanor (2000): *Die Globalisierung gestalten. Zivilgesellschaft, Kulturkraft und Dreigliederung*. Frankfurt am Main, p. 19.

⁴⁴ With this definition, he is referring to - amongst others - to: Cohen, Jean/Arato, Andrew (1994): *Civil Society and Political Theory*. Massachusetts.

⁴⁵ Perlas, Nicanor (2000): *l.c.*, p. 130.

influence of civil societies to fully unfold, Perlas states. An intermediary function between civil society and state, he says, is just as indispensable as rooting politics in civil societies.⁴⁶

Moreover, new actors of civil society have also “entered the socio-political arena. Their grassroots level and project-based way of working, their orientation towards organisations with networked structures, and their disposition towards protest and civil disobedience place them in the vicinity of what we have already seen in the new social movements”.⁴⁷ Historically, a conflictive impetus emerged from social movements, and present-day government social policies and professional social work have evolved from it.

The new forms of socio-economic self-organisation against expropriation and privatisation or in order to secure livelihoods can be regarded as the fight for the basic civil right to social, political and economic participation. The objectives of these organisations span beyond the interests of particular groups, taking on a socio-political dimension. These movements are true forms of social self-help, as they are a collective effort and originate from a social motivation. Socio-economic self-help and self-organisation are radically different concepts from the quest for employment or the - often precarious - business start-ups through individuals. These concepts aim at achieving goals that are primarily social by employing economic means, which always makes them political. “People's own activity, the collective acquisition of rights, skills, creativity, resources, and power”⁴⁸ are their decisive factors. These models concentrate their limited strengths in associations, and attempt to secure sustainable access to their own and shared bases of life.

The Canadian Robert Campfens describes the effect of such socio-economic movements in his international survey on community development: “Another trend witnessed in recent years is the spectacular rise of social and co-operative movements, many of them serve as agents of CD. Among the most numerous of these movements (...) are the myriad of apparently spontaneous, self-managing local rural and urban

⁴⁶ Ibid., p. 140.

⁴⁷ Roth, Roland (1997): Die Rückkehr des Sozialen. In: *Forschungsjournal Neue Soziale Bewegungen*, Issue No. 2/1997, p. 38.

⁴⁸ Zeller, Christian (2004): Zur gesellschaftlichen Aneignung. In: Zeller, Christian (ed.): *Die globale Enteignungsökonomie*. Münster, p. 312.

organizations that seek to ensure their members' survival through co-operative production, distribution, and consumption. (...) these 'defensive' social movements do not explain the rise of all those social and co-operative movements, that exist to create change (...) These latter movements are often driven by the search for alternatives to the capitalist industrial models, to the state-controlled social programs, and to the centralized, hierarchical, top-down, institutionalised structures of decision-making. The alternatives these groups apply may take the form of redirecting the economy toward the community, the environment, and a sustainable future."⁴⁹

Socio-economic self-organisation and socio-political innovation

According to Böhnisch, Schröer and others, restructuring the relationships between the field of voluntary commitment by means of collective self-organisation and the welfare state take centre stage in the concept of the formative social state. "This is based on the idea that social policies require a general reinvigoration in order to develop a counterworld to - and, consequently, raised social discomfort with - the development of digital capitalism."⁵⁰ Hence, they are not related to institutionalised leadership, but to the socio-political discourse on the fraught relationship between the economy and social system, which, historically, developed as an independent power and uncovered fields of both consensus and conflict in societies.⁵¹ The standard to measure social policies by today is a further development in the direction of full societal participation based on the opportunities offered by unfolded productive powers, the effective astringency of infringements through the market around the globe, and the promotion of civic self-organisation in all socially relevant fields.

Twenty years ago, Jürgen Habermas commented as follows on the situation of the welfare state: "In a situation in which economic stagnation, increasing unemployment levels and crises of public institutions can be related to the cost of running a welfare state, the

⁴⁹ Campfens, Robert (1999): *Community-Development around the world*. Toronto, Buffalo, London, p. 5.

⁵⁰ Böhnisch, Lothar/Schröer, Wolfgang (2002): *Die soziale Bürgergesellschaft*. Weinheim, Munich, p. 184.

⁵¹ *Ibid.*, p. 183.

structural restrictions of the compromise on which the welfare state is based and by which it has been maintained can be felt.”⁵² In such a situation, the welfare state runs the risk of losing its social basis, in the case that its (yet) gainfully employed contributors turn against the claimants of its benefits, thus revoking the welfare states' basic legitimation. If, under such conditions, the welfare state was to lose its central reference point - labour - it can no longer be about including this norm. The project of a sustainable welfare state should exceed beyond introducing guaranteed minimum wages in order to break the spell that the employment market has cast on the life stories of all those that are fit to work - also affecting the growing and increasingly excluded potential of those who only stand in reserve. This would be a revolutionary step, but not revolutionary enough.”⁵³ Habermas adds that the advocates of the welfare state project only ever looked in one direction: “The primary task was to discipline abundant economic power and protect the life-world of salaried employees from the destructive effects of critical economic growth.”⁵⁴ But no attention was paid to the legal and administrative means of implementation for the programmes of the welfare state, which led to a practice of individualisation of cases, levelling, and control, a practice that separates, restricts, and supervises the claimants, forcing them into a passive and conformist role.

Habermas emphasises that there is no alternative to preserving the welfare state and developing it further, but this requires a path-breaking combination of administrative power and intelligent self-restriction in order to mitigate the destructive effects of an interventionist state on its citizens' life-world. This points to a formative social policy that enables and promotes civil self-organisation. As long as social policy is “lined up as a policy to create readiness for work, and every agenda item that is identified arouses the institutionalised suspicion of abuse, a change towards structural regulation means a reproduction of the pattern of undersupply, exclusion and repression that we are already familiar with.”⁵⁵

⁵² Habermas, Jürgen (1985): l.c. p. 149.

⁵³ Ibid., p. 157.

⁵⁴ Ibid., p. 150.

⁵⁵ Cremer-Schäfer, Helga (2004): Nicht Person, nicht Struktur: In: Kessl, Fabian/Otto, Hans-Uwe (eds.): Soziale Arbeit und Soziales Kapital. Wiesbaden, p. 181.

It is true that unemployment should be the starting point for any endeavour of socio-political reform. But unemployed or poor people also need to be able to form a social movement through collective self-organisation. As a matter of fact, none of the employment policy measures that have been put into practice in Germany since the 1970s were aimed at cooperative forms of self-help. These are intensely contradictory of the systematic individualism of neo-classic economics. The social security system of the welfare state centres on the redundant and isolated individual. The ignorance towards approaches of cooperative and mutual action, e.g. the foundation of cooperatives with employment-related and social objectives, and the fixation on individualised approaches to explaining causes and intervention approaches are deeply rooted in the history of the capitalist society. Solidarity and a diversity of lifestyles and ways of utilisation are systematically rejected and are perceived as a threat to particular interests.⁵⁶

Making individual provisions, taking care of oneself, and acquiring wealth are - and always have been - highly rated. Joint efforts to improve one's situation, on the other hand, have never been - and are still not - desired. Instead, preventing collective self-organisation is a recurring theme both in history and in at present. "So long as the needy restricted themselves to welfare work and other activities that were neutral towards the system, such as work in friendly societies, they would be - subject to a certain extent of supervision - tolerated. Society-based initiatives took on a political character, though, and now pose a threat to the existing balance of power and ownership structure."⁵⁷ The bans on forming coalitions and on assemblies enforced in the late 18th century and in the 19th century forced such associations to work in the underground, which, however, only increased their internal cohesion. But today, as opposed to the former workers' movement, there is no shared experience of unbearable working conditions, which had previously led to the formation of defensive movements and cooperatives for economic self-help. This is a major problem for the growing number of victims of the economic system, especially in western industrialised countries, where problematic social situations are individualised in the discourse and then

⁵⁶ Altner, Günther (2004): Ein Wert an sich. Vielfalt und Nachhaltigkeit. In: Politische Ökologie, Issue No. 91-92, p. 19.

⁵⁷ Wendt, Wolf Rainer (1995): Geschichte der Sozialen Arbeit. Stuttgart, p. 63.

professionally worked upon. Shame and retraction are the intended consequences of this, not the abilities required for self-help and self-organisation.⁵⁸

Creating the political and legal framework to enable socio-economic self-organisation or encouraging it through social policy, as it is practised in Italy, is hardly conceivable in a country as statist as Germany. Even in Italy, this practice could only unfold its lasting strength through an intense cooperation between organisations with different mindsets and different professional associations in civil society, which joined forces to assert themselves against the economic and political system. The development of cooperatives with social objectives in Italy is a convincing example of the success that active governmental support for socio-economic self-organisation as means of formative social policy can bring. These cooperatives take on social, educational and health service related tasks, and are targeted at the integration of disadvantaged people into the labour force, or combine social and healthcare services with the integration of employment. These cooperatives are partially exempted from income tax, social costs, and contributions to insurances and pension funds, and are also financially supported and have a cooperative infrastructure of their own at regional and supra-regional levels.

Böhnisch and Schröder also devise an interesting step towards a formative social policy in connection with the possibilities of civic engagement through elderly people. “As elderly people are not subjected to the constraints of their role in the labour society or in their families, they have a freedom to experiment that younger people do not have, and this can be activated. This means that elderly people, as a social group, could be assigned an important role in building regional social economies. (...) Why should elderly people not be capable of providing services - from the general merchandise store to social care services - in rural areas? They do not need to rationalise their offers or their work, on the contrary, they have the capacity and capability to take on complex social tasks. (...) The special value of such regional economies is the fact that people from both the producer side and the consumer side contribute

⁵⁸ cf. Munsch, Chantal (2003): Lokales Engagement und soziale Benachteiligung. In: Munsch, Chantal (ed.): Sozial Benachteiligte engagieren sich doch. Weinheim, Munich.

to them and can build social relationships. (...) The new elderly could also participate in intergenerational models, which are based on the division of labour and could help overcome the intergenerational competition that has crept into markets and society lately.”⁵⁹ Elderly people would need to be financially secure in order to bring in their full potential. They could become the pillars of socio-productive innovation in civic society - which would give them the chance of putting the professional and social skills they have gained during their career to practice without the need to shy away from conflict. In order to make this concept of socially productive commitment happen, the traditional culture of caring for the elderly would have to make room for socio-economic structures of enablement.

In the western industrialised countries, new socio-economic associations are primarily run by organisationally skilled citizens that also fight with and for disadvantaged people and their right to participate, in organisations that are based on solidarity - such as social cooperatives. The opportunities for self-help run along the demarcation lines of social inequality, and in welfare states, the efforts in favour of self-determined participation for disadvantaged people are often opposed by the self-interests of those organisations that claim themselves to be the representatives of the poor and disadvantaged members of society.

The principles that characterise associations are the voluntary basis on which they are formed, the solidarity between and equal status of their members. As organisations based on community, they can only serve to enhance freedom and existential security in combination with social policy. The latter provides the life management resources that individuals can - but are not obliged to - incorporate in their action strategies. These resources are a necessity, but the conditions and barriers to accessing them need to be reduced.

Formative social policy would thus need to be based on the following fundamental premises:

1. To protect the social and ecological life interests, and value these higher than ownership interests.
2. To enable socially productive participation by means of self-organised activity which is based on commonality and targeted

⁵⁹ Böhnisch, Lothar/Schröer, Wolfgang (2002): l.c., p. 97.

- at a social objective, as well as the participation in social and communication networks across all relevant areas of society.
3. To take into account the social aspect as an integral part of socio-economic solutions. Social problems should not be regarded as external to the economy, and not be worked upon as separate issues from economy.
 4. Public spending should be organised in a pluralistic and democratic organisations - e.g. in multi-stakeholder enterprises - in an effective and synergetic way.
 5. Social local policy should use the available material resources and social capital a way that is socially productive. It should generate and manage material resources and social capital.
 6. Formative social policy should open up opportunities for learning and experimenting with new approaches to solving societal problems, also and especially in areas where members of society are marginalised. It requires new forms of organisations, especially in the economic system, the system of education and the system of political administration.⁶⁰
 7. It should be guided by the principle of a plural economy that serves the satisfaction of human needs and respects its ecological limitations.
 8. It requires the possibility to generate resources independently through activity in markets and non-market economies geared at social objectives.
 9. Against the backdrop of mass unemployment, it is necessary to relieve the people affected by redundancy from the crushing fears for their existence through providing guaranteed basic social care, and to rid them from the indignifying compulsory labour in order to receive transfer payments. The partial detachment of being gainfully employed and making a living is the basis for the development of new, socially integrated economies.

Social policy develops from collective attempts of coping with social problems. When individuals who are affected by the same

⁶⁰ Sommerfeld, Peter (2004): Sind gesellschaftliche Probleme gemeinschaftlich lösbar? In: Kessler, Fabian/Otto, Hans-Uwe (eds.): *Soziale Arbeit und Soziales Kapital*. Wiesbaden, p. 247.

conditions form associations, this generally bears potential for political change. Today, just as it used to be in the times of the beginning workers' movement, the capacity for collective action is based being in the same situation together and reflection upon it, and sharing a common interest to change it. According to Böhnisch and Schröer, this capacity is the historic legitimation of socio-political movements, and it needs to be reactivated in view of the current conditions of excessive capitalism and the tendency towards the redundancy of human labour.⁶¹

Everywhere around the world, collective actors are opposing the new economic mindset of expropriation, are defending life's basic rights and bringing socially integrated forms of economy to life as alternative concepts. They are part of a new grassroots social policy, which will lead to social change in the long run despite the strong resistance there is to it. And today, in view of the changed conditions, all this is no longer only about regaining political control of the powers of the market, or about protecting individuals and communities from infringements through the market, but about developing and maintaining plural forms of independent community-based social economies as an integral part of the life-world.

⁶¹ Böhnisch, Lothar/Schröer, Wolfgang (2002): l.c., p. 146.

ENHANCING SOCIAL INCLUSION OF ELDERLY PEOPLE WITH DEMENTIA: PRINCIPLES OF QUALITY WORK IN INSTITUTIONS

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Abstract:

The issue of combating social exclusion of individuals and groups in the society has a long tradition in Europe. The category of elderly people has been cited as one of the risk category for marginalization by the Commission of the European Communities in the year 1992. Elderly people experience different deprivations, for instance deprivation of resources and social ties, especially those with severe diseases and handicapped. Despite of the fact that general aim in different European countries (including Slovenia) is to keep elderly people in the community as long as possible to provide social inclusion and that throughout Europe there is a diversity of service provision, in Slovenia until now the community services have not developed specialized care for elderly people with severe diseases, especially dementia. Therefore elderly people with dementia are usually housed in the homes for the aged when they or their home care givers are not able to take care of them any more. It seems that in Slovenia the nursing staff and social care staff in the institutions for the aged were not well prepared for this situation. Recent development of the care for the aged in the institutional environment has been in favour of developing psychosocial model as a necessary complement to the prevailing biomedical model, but there was no data available on whether psychosocial model is implemented and what is the impact of the work of service providers on people with dementia living in the institutional environment - does this model enhance social inclusion of elderly people with dementia.

The results of a small-scale qualitative research, based on the methods of participant observation, regarding the implementation of principles of quality work (defined according to Brandon as good relationship, possibility of choice, participation, possibility of personal development, social integration) in the institutional environment when treating elderly people with dementia review that the relationships between people are good and they have the possibility of personal development and to choose among alternative activities. But on the other hand the principles of participation and especially principles of social integration are not considered as much as they should be. When trying to improve the use of principles of quality work, the important factors may be the stage of dementia, organization of work and the staff in the institution. The principles of quality work are present while treating people with dementia in the first stage but the use of the

principles declines with the severity of the disease. It is also important that the staff members have enough time to care for people with dementia and to plan and implement programmes for them.

Keywords: **Dementia, institutions, integration, relations, inclusion**

I. Introduction

The issue of combating social exclusion of individuals and groups in the society has a long tradition in Europe. Elderly people experience different deprivations, which can lead to social exclusion, for instance deprivation of different resources and social ties, especially those with severe diseases and handicapped (Jordan, 1996). The category of elderly people has been cited as one of the risk category for marginalization by the Commission of the European Communities in the year 1992 (Commission of the European Communities, 1992). With the demographic shift the proportion of elderly people in society is increasing. According to Glendinning (1998) the general aim in different European countries is to keep older people in the community as long as possible. Phillips and Waterson (2002) stated that throughout Europe there is a diversity of service provision. In Slovenia there are similar guidelines regarding care for older people (NPSP, 2000) and in the last few years the development in the community care services has been significant. Due to the fact that until now the community services have not developed specialized care for people with dementia, these people are usually housed in the homes for the aged when they or their home care givers are not able to take care of them any more. Risk of dementia raises rapidly with age: 22% of people aged between 85 and 89 and 41% of people aged 90 and more suffer from dementia (Pečjak, 1998). Therefore the institutions for the aged house higher proportion of users who suffer from dementia (Chapell and Reid, 2000). Matthews and Denning (2002) stated that the prevalence of dementia in institutional care settings is 62%.

It seems that in Slovenia the nursing staff and social care staff in the institutions for the aged were not well prepared for this changing situation. Recent development of the care for the aged in the institutional environment has been in favour of developing psychosocial model as a necessary complement to the prevailing biomedical model; nevertheless

this endeavours have not been systematic and don't have the history of more than two decades as in the UK where, as Parker (2005: 263) describes, was a shift in paradigm '...from the biomedical model to a more psychosocial and person-centred approach to dementia'. Chapell and Reid (2000: S234) found out that the researchers in western countries '...are turning their attention to determining how to care best for persons with advanced dementia in long-term care facilities...' but such studies are relatively uncommon. This is particularly the case in Slovenia where no such study has been carried out and there was no data collected on the quality of care for people with dementia before the study presented in this article. Due to the lack of information there was a need to assess the quality of the institutional care for people with dementia and on the basis of results to suggest possible implications and recommendations.

In this article some of the most important criteria which was chosen to assess the everyday life conditions of people with dementia living in homes for the aged, are discussed; the main principles of quality work are described; the methodology of the study, with the aim to assess the presence of the principles of quality work and to identify the factors influencing the use of these principles is presented. In the central part the main findings of the research, regarding the presence of principles of quality work, are presented in different sections for each principle and some suggestions are proposed in the concluding part.

2. The principles of quality work

In the last few decades different principles of quality work (normalization, integration, inclusion) have been taken into account when organizing the care for people in the institutional environment in Slovenia (Cizej, Ferlež, Flaker and Lukač, 2004). The main purpose of normalization is de-stigmatisation of the user, who should have the possibility to take an active part in life, the same way as other people do (Brandon, 1993). The concept of normalization originates from the conceptualisation of individuals' deviance not as their characteristic but as a social phenomenon whose harm can be reduced by social measures (Rode, 2001). According to Wolfensberger (1983), normalization is the reduction of the individual's deviation and its consequences. Procedures of normalization of the individual to achieve the aim of socially appraised living conditions and roles can be divided into two fields: the

improvement of their social image or value in the eyes of others, and the increase of their competence. Further development of the normalization theory¹ brought about an emphasis of the need to reduce the deviation of individuals by increasing social tolerance and changing social norms (Flaker, 1993).

In the last years new terms and concepts appeared as regard the care for people with special needs – integration, inclusion (Kobal Grum, Kobal 2006), including also some of the characteristics of term normalization. These concepts can be seen as goals of normalization according to Brandon (1993), but on the other hand we could consider them as improvement of the principles of normalization, since especially the wishes, needs and individual treatment of the users are emphasized on the way to achieve the goals of the user him- or her-self as final step of inclusion (Žolgar Jerković 2006: 23).

The use of principles of integration and inclusion has expanded significantly from the field of care for people with disabilities to the field of care for other people living in the institutional environment in Slovenia, partly also due to the National Programme for Social Protection until 2005 (NPSP, 2000) which stated that performers of social protection programmes should ensure expert support and help in the prevention and resolution of situations of social distress to all those who find themselves in risky life situations and to those who are, due to various reasons, unable to live and work independently, or cannot function successfully in their social environment; to ensure the influence of the users on the implementation of programmes and services and offer them the possibility to choose the most appropriate form of help. Therefore the use of those principles can be one of the most important criteria of quality assessment of institutional care for people with different disabilities and could be named as principles of quality work. The presence of principles of quality work can have a positive effect on some of the problems quoted by Dwyer (2005: 1081) ‘...disruption of social network and loss of the optimisation of daily functioning’, and can enhance social inclusion.

¹ The concepts of work deriving from above mentioned development were named as integration and later on as inclusion.

In Slovenia there have been different research projects (mainly diploma papers and master degree papers) assessing the presence of principles of quality work in the institutional care for people with disabilities, using surveys with close-ended questions and scales or interviews based on the principles of quality work according to Brandon (1993): presence of good relationships, possibility of choice, participation of users, possibility of personal development, social integration; but among them there has not been any detailed research on everyday life conditions of people with dementia living in the homes for the aged.

3. The study

With a small-scale research which was conducted while implementing the project named 'Caring for People with Dementia – Planning the Model of Care for People with Dementia' (Flaker, Kresal, Mali, Milošević-Arnold, Rihter and Velikonja, 2004), financed by the Ministry of Labour, Family and Social Affairs, the research team wanted to find out to what extent the principles of quality work, according to Brandon (1993), are present and visible when caring for people with dementia, who live in the homes for the aged. Another objective of this research was to disclose the factors that could influence the possibility of putting into force the principles of quality work.

The data were collected with the cooperation of students of Faculty of Social Work in 21 homes for the aged² for 27 people with dementia³. The sample of homes for the aged was a purposeful, convenient sample (Patton, 1990). We chose the homes in which the students were on their regular praxis. Due to the above-mentioned reasons the sample is not representative. It was impossible to collect the data using the methods of questionnaires or interviews, because not all people with dementia can verbally communicate their answers, due to the illness, which is usually the consequence of brain damages and '... is manifested as a severe

² The number of all institutions providing care for the aged in the year 2004 in Slovenia was 65 (Flaker, Kresal, Mali, Milošević-Arnold, Rihter and Velikonja, 2004).

³ The exact number of people with dementia living in the homes for the aged was not available. It was estimated that the number is about 3000; representing about 20% of all elderly people living in the homes for aged (Flaker, Kresal, Mali, Milošević-Arnold, Rihter and Velikonja, 2004).

decline in intellectual functioning with symptoms of mind and memory deterioration, of confused speech, of the loss of time and space orientation...' (Pečjak, 1998: 145). Therefore data were collected with methods of participant observation; similarly to Melin Emillson's (2005) method, which she used in her various research studies. The research team had prepared the guidelines and the students were observing people with dementia and all activities, which were available for them during the entire day (24 hours). The students estimated the presence of following principles of quality work: good relationship, possibility of choice, participation of users, possibility of personal development, social integration, with the marks between 1 and 5 (mark 1 signifies a 'very small scale', and mark 5 a 'very large scale') and described in detail the actual examples of events and situations, which were the basis for assessment.

Presence (or absence) of good relations was estimated on the basis of observing the relations between people with dementia and employees within the institution, between people with dementia and other users and by estimation of equality between people with dementia and employees.

In the second part of the research the students tried to find out whether there is a possibility of choice in the homes for the aged, using the following questions: Do the people with dementia have control over their lives? Do they have a possibility of choice among various activities? Do the employees respect the decisions made by people with dementia? Does a person have a possibility of acquiring new experiences? Does a person manage his/her finances?

In the third part the students estimated whether it is possible for people with dementia to participate in the home for the elderly (do the people with dementia have impact on the services which they use; do they have access to the necessary information; do the employees consult people with dementia about the activities which are taking place; do people with dementia have the possibility of advocacy; can people with dementia decide on things which are important in their lives; is the power equally balanced between the user and the staff).

The possibility of personal development was estimated through the questions whether people with dementia are respected persons with a possibility of personal development; whether the privacy of people with

dementia is respected and whether there is an individualized planning of care.

Social integration was assessed with questions whether the people with dementia are associating with people who are highly respected in the home and outside the home and whether it is possible for people with dementia to use public services.

The estimates were used to calculate averages and the descriptions were analysed by the methods of qualitative content analysis of data (Mesec, 1998). First, the written material was organized and the units of coding were determined. In the next step the units were coded openly, and then relevant conceptions were chosen and defined. Finally, a kind of grounded theory was developed. The averages cannot be generalized to the entire field of institutional care for the elderly people with dementia in Slovenia because the sample was not representative. Apart from this, the differences between the average estimates show that some principles of quality work, when caring for people with dementia, are present to a greater extent than others. For the purpose of research and especially for planning the model of care for people with dementia, the factors that could influence the possibility of putting into force the principles of quality work were of greater importance than the estimates themselves, because the final objective of the research was to suggest the modifications in the organization of care for people with dementia, which could enhance the presence of principles of quality work and that way to enhance also the social inclusion.

4. The findings

4.1. Good relations

We found out that good relations in the observed homes for the aged were present on the 'middle scale' (average mark: 3.35).

Relations between the people with dementia and employees re-establish in different everyday activities in which the people with dementia take part (while serving meals, nursing, during other organized activities in homes for the aged). The quality of relations can be seen in verbal and non-verbal communication, in (un)kindness of employees and users. On average, good relations between the people with dementia and employees are present on the 'middle scale' (3.46). There were many descriptions of good relations, but there were also some particular

descriptions, which indicate 'bad relations'. While nursing, some employees do not wait long enough to make it possible for people with dementia, for example, to dress themselves. Instead of waiting, the employees do everything quickly. In some cases there is hardly any verbal communication (some people with dementia are quiet most of the time and they would need the incentive from the employees to begin to speak). Bad relations can be seen also in the non-verbal communication (for example: a person with dementia drops an object deliberately) and in the unkind behaviour of the employees.

The relations between people with dementia and other users also re-establish in different activities (during work-therapy, lunch, group activities, special activities, spare-time, etc.). The relations can be seen in verbal and non-verbal communication, in help between users, in (non)participation in the informal groups of people with dementia, establishing friendships, knowing each other etc. On average, the good relations between people with dementia and other users are present on the 'middle scale' (3.17). A lot of evidences of good relations were presented by the students, but the students also noticed the events, which show some bad relations, for instance: people with dementia are present during some activities but they do not show any interest, or they do not want to attend any activity. During the work-therapy, a person with dementia was very angry, because another user was walking around all the time and she therefore hit that user. Even in the spare-time some people with dementia never divert, they live in their own world and drive away people who are trying to approach. In some homes for the aged other users draw back if a person with dementia approaches. It is difficult to re-establish a relationship if there is no verbal communication. Some people with dementia never start the conversation and only answer to direct questions; some of them never speak with another user. On the other hand, however, there are people with dementia who are upset all the time. Through the non-verbal signs it is also possible to value the relation (anger can be noticed on someone's face, high pitch of their voice, banging on the table, etc). Furthermore, some people with dementia are totally excluded from informal groups (they are either not desired in these groups or do not even have access to them).

Good relations between people with dementia and employees or other users in homes for the aged depend on various factors. The stage of

dementia⁴ has a strong impact on developing relations on verbal level. While verbal communication is possible with people in the first stage of dementia it is very difficult to talk to people in the last stage of dementia. In such cases non-verbal communication (smile, touch, gentle voice) as a mean of re-establishing good relations is of great importance, but unfortunately, as we were able to observe, this is rarely the case in the homes for the aged.

It is difficult to influence some of the identified factors – personal characteristics of people with dementia, their temporary mood and personal characteristics of employees. But it is possible to influence the factor of contacts. If there isn't any contact between people with dementia and employees (usually there are only contacts between people with dementia and those employees who are directly responsible for people with dementia) or other users (people with dementia who live in the guarded department do not have contacts with other users), it is impossible to expect that any kind of relations will develop. Therefore the contacts should be deliberately stimulated. Employees could have a coffee break with people with dementia; users from other departments should be invited to the guarded department where people with dementia live and joint activities should be organized. Another factor that has impact on the relations is very strict and abundant schedule of employees, which makes longer and more genuine contacts impossible. This could be improved by an appropriate standard setting with regard to the number and qualification of the employees and by changing the organization of work-process. Another factor influencing the good relations is also the extent to which the wishes of people with dementia (regarding different bonuses) are respected. Therefore the relations can improve if the employees respect these wishes. Appropriate organization of activities, which are directed by employees, is another important factor influencing the relations. If the employees anticipate, for instance, the schedule of nursing, the arrangement of people at the kitchen table on the basis of characteristics of people with dementia, it is possible to avoid tensions

⁴ The stages of dementia were divided into three groups (according to Kogoj, 1996): people in the first, commencing stage of dementia usually have bland symptoms of dementia; in the second, progressing stage people suffer severe disturbances in the intellectual functioning; in the third stage people are hardly capable of verbal communication.

and conflicts. An important obstacle, when trying to establish relations, is also distrust of other users in people with dementia. This could be (partly) surpassed by additionally informing other users about the disease.

The following facts indicate the equality between the people with dementia and the employees: whether the people with dementia are treated accordingly to their age, whether the people with dementia can call employees by their first names, whether the employees treat people with dementia respectfully and respect their wishes and interest; whether they can share all the necessary objects and facilities, whether the employees take part in informal parties of the people with dementia, whether the employees ask people with dementia for some kind of advice and whether they show equality in relations to all users.

On the average, the equality is present on a 'middle scale' (average mark: 3.46). Nevertheless, there are some evidences of inequality which show that the employees do not treat people with dementia properly, according to their age (they treat them like children); employees do not have a respectful attitude (they do not address them formally – in Slovenian language using the pronoun "ti" instead of "vi", which indicates the lower level of formality; they yell at them, they insult them, the nursing process is impersonal); employees and people with dementia do not share things and facilities (employees have separate toilettes, separate service).

The level of equality depends on the stage of dementia. Usually there is equality between the employees and people in the first stage of dementia, but there is less equality when it comes to people in the third stage of dementia. An important factor is also the organization of work. There could be more equality if employees had enough time to invite people with dementia to cooperate in different activities. The appropriate activities could probably lead to the extension of the first stage of dementia and the dementia would progress very slowly, facilitating the level of equality. It is necessary to assure people in the second and in the third stage of dementia to be treated respectfully and according to their age. Had they expressed some special wishes (clothes, food,...) before the dementia progressed, those wishes should be considered now, even if they are no longer able to communicate them.

4.2. Possibility of choice

On average, the possibility of choice is present on the ‘middle-scale’ (mark: 3.01).

Some people with dementia can control their lives in various fields: personal hygiene (the decisions such as, when to go to the toilette, when and how to bathe and wash themselves); clothes (which clothes to wear, to dress themselves); bonuses (they can obtain some bonuses if they want to); medical therapy (it is possible for them to reject certain therapies); food (they can decide whether they will eat, what kind of food they will eat, how much they will eat, when they will eat); money (what to do with the money); freedom of decision regarding exercise (in the department, in institution, and in the surroundings); decisions regarding the activities (people choose freely which activities they would like to join and participate in; flexibility when implementing activities, which are common for all users – getting up, daily meals, etc); decisions regarding the timetable of activities (when to implement activities, when to go to bed, when to get up), decisions regarding the manner of implementing activities (agreement with employees and adjustment of program to the people with dementia). Students estimated that people with dementia do not have much control over their lives (average mark: 2.57). Evidences show that control over life is (at times) limited in the fields of personal hygiene (nursing staff persevere in bathing although the person with dementia doesn’t want to take a bath; people with dementia cannot decide when they will bathe due to the fixed schedule nursing staff have prepared); bonuses (alcoholic beverages are strongly limited); medical therapy (person who does not want to go to sleep, must take medicine – soporific; they have a compulsory schedule of medical examinations and therapies); food (menus are combined in advance, people can only choose between two different dishes; schedules of daily meals are fixed and after the meal it is practically impossible to get food); finances (people with dementia are not allowed to take decisions regarding their money and finances); free exercise (in some homes they cannot move around freely even in the guarded department, not to mention the surroundings of home, since the only possibility to get out is to have escort; the possibilities of free exercise are limited due to the fact they live in the institution); decisions regarding the activities (in some homes for the aged, people with dementia are obliged to attend the activities even if

they do not want to; in some homes they can participate in activities or can take a rest only if they have escort, which is usually not available); decisions regarding the timing of activities (usually the timetable of activities is decided in advance, therefore people with dementia cannot decide when the activity is going to take place; in some homes people with dementia would like to have some activities in the afternoon, but this is not possible due to the lack of staff; they cannot decide on daily activities which are common for all users in homes: they have to get up and to go to bed according to the schedule; the situation is similar regarding their daily meals); decisions with respect to the manner of implementing activities (the exercises are fixed; the programme was composed by the employees and people with dementia have to follow it). The wishes of people with dementia are fully respected in some homes, while in others the wishes are respected only if the employees think they could have some benefit for the people with dementia.

Data show that people with dementia have the possibility of choice among various activities on a 'middle scale' (3.42). In order to assure this possibility, there should be a huge number of activities available. Types of activities (special activities for people with dementia, possibility of individual work), timing of activities (activities should be available during the day), and the opportunity for people with dementia to actually decide which activities they would like to participate in, are important factors here. Empirical evidences show that in some homes there are only few activities (for instance gymnastics, discussion groups, singing groups), in some homes there are no activities whatsoever, or only the activities, which are common for all users (people with dementia cannot fully participate in those activities). In some cases, the activities are available only before noon, or are too rare, and the people with dementia are obliged to join the activities (for instance: gymnastics every morning).

Control over the life and possibility of choice among various activities depends mainly on the stage of dementia. With the progression of disease, the possibility of expressing the needs and autonomous decision-making diminishes. Therefore the employees have to be informed about special wishes and interests of people with dementia before the dementia progresses, or to ask relatives about this if there is a person with dementia in the last stage entering a home for the aged. Only thus the employees can respect the wishes of a person (maybe someone

wants a special kind of food, clothes, activities, to get up late) even if the person cannot express them verbally. Another important factor is again organization of work and the employees' style of performing the work. In some homes for the aged the employees are convinced of their own knowledge of what the best options for people with dementia are. Therefore the control over their lives and the possibilities of choice are limited. Employees should avoid such style of work and should begin to cooperate with people with dementia when preparing and implementing activities for them, and consequently to enhance a possibility of choice. Thus it would no longer be necessary to force people with dementia to join the only activity, which is available, since they would have enough activities available to choose from.

Employees respect the decisions made by people with dementia on quite a good level (average mark: 3.60). The decisions are respected regarding the personal hygiene, bedtime, food, roommates, clothes, and choice of activities. People with dementia can express their opinion in group meetings. In some homes for the aged employees do not respect the decisions of people with dementia or these decisions are rarely respected. Some descriptions of events show that a person with dementia did not want to take a bath but nursing staff made him/her do this; in addition, the nursing staff did not explain the basic procedure of having a bath and therefore a person with dementia didn't know what was going on. In some homes people with dementia are forced to eat according to the regular daily meal schedule, even if they do not want to. Sometimes the nursing staff decides upon the clothes even when people with dementia want to be dressed another way. When deciding about joining the activities, in some homes the employees respect only the decision which is, in their opinion, in favour of people with dementia and cannot hurt them, therefore the employees persuade or sometimes even force people with dementia into activities; sometimes they respect the decisions and sometimes not. Too often the employees direct the lives of people with dementia and they do not ask themselves whether a person with dementia agrees with their decisions or not.

The respect for the decisions made by people with dementia partly depends on the stage of dementia, the conditions connected to people with dementia (life story, important relatives and acquaintances), and on the working-style of the employees. We cannot essentially influence the

stage of dementia, but we can lay more emphasis on informing the employees about the importance of respecting wishes of all people, regardless of what they did in the past and how important their relatives are. People with dementia know what is best for them and when employees respect their decision, both parts can through cooperation and participation improve the quality of life.

Students have observed whether the people with dementia have had the opportunities to acquire new experiences. This possibility is present on a 'middle-scale' (3.06). Opportunities to acquire new experiences are present during group-work, establishing friendships, help provided by the employees. People with dementia have access to all information, which are available in institution. However, the additional needs regarding the acquisition of new experiences can be noticed: activities should be available during the day and not only before noon. In some cases the possibility to acquire new experiences is very limited (new experiences can be acquired during some performances or while they are in the company of other users), or is not available due to the similar or equal everyday activities. Furthermore, in some homes for the aged the employees are trying to provide activities, which are known to the people with dementia, but in the others there is only nursing care available and it is therefore not possible to speak about acquiring new experiences. Due to space limitation (people with dementia are placed in the guarded departments) people with dementia have even less opportunities for new experiences.

Opportunities to acquire new experiences depend on the stage of dementia, the interest of people with dementia and on their life-story (if they had a lot of interests before, it is not difficult to motivate them for some new activities).

Since the possibility to acquire new experiences depends mainly on the level of inclusion in the activities, people with dementia should be motivated and encouraged to participate in activities, or to find the activities they would like to participate in, and to ensure the acquisition of new experiences.

The possibility of people with dementia to manage their own finances is possible only on a 'small scale' (1.93). There are few people with dementia who have their pocket money, which is usually spent for small articles. Sometimes they only have a few coins in their purse. In

some homes for the aged the staff believes that people with dementia don't need the money and therefore they don't have the money on their disposal. Not even one of the observed people with dementia is allowed to manage their finances. They usually get all the money they have from their relatives.

An important factor that influences the possibility of managing the finances is the stage of dementia. People with severe dementia have an authorised representative, who is taking care of their money. But there are a lot of conflicts when it comes to the manner of spending money, for instance, the person with dementia wants some bonuses but the authorised representative wants to buy him/her shoes even if the person with dementia never leaves the home for the elderly and actually needs only slippers. It is therefore necessary to consider how to ensure at least some pocket money for people with dementia.

4.3. Participation

On average participation of users with dementia is possible on a small to middle scale (2.89).

People with dementia have small impact on services they use (2.29). They would have impact if they were cooperating in committees, boards or councils, having the opportunity to express the opinion to employees and if employees were satisfying the wishes of the people with dementia. In reality, none of the observed people with dementia cooperated in any committee, board or council. They can express the opinions, but the procedure is different in various homes for the aged. In some homes they can speak about their problems only to the senior nurse, in some homes to all employees or only to those who work with them, or they have special meetings once a week, where people with dementia can express their opinion. In few homes the only possibility is to put a written opinion into a small box, which is located in the reception hall (which is not accessible for some people with dementia) or in the department for people with dementia. There are a lot of differences when it comes to satisfying the wishes of people with dementia. In some homes for the aged, the employees respect certain wishes, such as transfer to different rooms, food etc. On average, however, their wishes are respected only partly. Some wishes cannot be satisfied due to insufficiency of objective

possibilities (e.g. lack of employees to be able to provide some kind of group activities in the afternoons).

Access to information needed by people with dementia is possible on a large scale (3.80). The main sources of information are: posters with important notifications about various activities (schedule), meetings; in some homes there are big calendars to remind people with dementia about the date. Elsewhere the main source of information is meetings, which are organized once a week. In many homes for the aged the information are gained through active personal notifying of employees, relatives and people with dementia. An important manner of providing information is also inscriptions on the doors of the rooms (names of users), labels for bathrooms, kitchen, switch etc. The extent of informing is different in various homes and therefore some people with dementia are regularly informed about the activities, while in other homes the level of informing is rather poor.

The employees consult the people with dementia as regards activities, which take place on the middle scale (3.09). It would be good practice if decisions about activities were reached through the consultation between employees and people with dementia. This is already the case in some homes – there are individual consultations about the activities between the people with dementia and the employees, whereby employees listen to people with dementia as regards their wishes and needs and as soon as activities begin, the employees explain what will be going on and try to talk about the activities with people with dementia, who do not respond. In some homes for the aged decisions about activities are reached without consulting the people with dementia, whereby the main excuse is the specific disease (i.e. dementia) due to which employee is the only one who knows what the best activities for people with dementia are.

Possibility of advocacy is present on a small scale (2.53). The interests of people with dementia are usually represented by relatives or in one case by the representative of elderly people in the home for aged. In the majority of the observed homes for the aged, advocacy is not formally organized. In some homes for the aged there are volunteers while in others there aren't any. Even in the homes where volunteers are present, they are not there to provide advocacy but are trying to improve the quality of life of people with dementia. In all homes where there is

possibility of advocacy or volunteers are present, the opinions of representatives and volunteers are not always respected. In some homes the opinions of volunteers are not taken into consideration due to the fact that people with dementia don't even know what they did say a minute ago because of their disease. But there are some homes where employees are trying to respond to all of the suggestions and the opinions of relatives and volunteers. If employees have a lot of information about users, which were obtained when users entered the home, they try to adjust the activities to people with dementia.

People with dementia can take part in decision-making on a small scale (2.70). In some homes people with dementia have representatives of their interests (relatives, employees), but the extent of their impact is very small. In a few cases the representatives of interests of people with dementia cannot be found and people with dementia do not have any impact on life in the home; all activities are equal for all users and other people decide upon their life.

Students realized that the power isn't equally balanced between the people with dementia and the employees (2.27). Power is equally balanced when people with dementia can express their opinion; when the manner of employees' work is considered together with people with dementia; when people with dementia are encouraged to do the things they are able to do; when employees knock on the door before entering the room; when power is not strictly hierarchically distributed, whereby people with dementia can take decisions in certain things. Empirical evidences show that the power is usually hierarchically distributed. People with dementia can express their wishes to the under-staff working directly with people with dementia. This staff cannot pass on the information to the relatives, because only the social worker can do so.

Sometimes the distribution of power depends on the situation: if the employees think that leaving the power to people with dementia won't hurt them, they give the power; but if they think that it can hurt the people with dementia they do all the work without any consultation. An important factor, which affects the possibility of impact on services, used by people with dementia, the access to the information, the possibility of consultation, regarding the activities performed by the employees, and participation in decision-making, is the stage of dementia. People with the first-stage dementia have more possibilities to cooperate and

participate, while others are severely limited (even when accessing information which is usually present on a large scale, for instance people with severe difficulties read the information and forget them in the next moment; therefore it is necessary to remind them all the time). For a person in the last stage of dementia it is necessary to have a representative, who can advocate his or her interests and indirectly influence the possibility of improving cooperation. An important factor is also the organization of work – mainly the interest of employees to change the manner of work and schedule of work to be more adapted to wishes and needs of people with dementia.

4.4. Possibility of personal development

The research revealed that personal development of people with dementia is ensured on a middle scale (3.27).

People with dementia are respectful persons with a possibility of personal development on middle scale (3.54). This can be noticed in general relations of employees with people with dementia (respectfulness, equality), in processes of work (which are adjusted to the needs and wishes of people with dementia), in the appearance of the home (attractive, nice, friendly, hospitable, homelike, warm, adequately equipped with different colours); in various activities which are available (if there is certain amount of activities there are possibilities of personal development). If people with dementia are treated as respectful persons they will feel better and there will be positive atmosphere without tensions. In some homes or in some cases it is difficult to say that people with dementia are properly respected. For instance, some employees treat people with dementia like children; and make differences in treating people with dementia and other users. Even if the home for the aged is attractive it isn't a real home. One of the homes was described as old, untidy with broken doors, with old furniture, without comfort; there was a smell of urine, and the rooms were overfilled.

The privacy of people with dementia is respected on a middle scale (3.39). Privacy is assured in cases when employees ask for permission to enter the room; when people with dementia can choose who their roommate will be; when people with dementia are alone during the activities of personal hygiene and care. The respect of privacy is seen also in the fact of how many people have the information about people with

dementia. When information is limited to few people (employees who work directly with people with dementia, close relatives), who give the information only in certain cases (i.e. researches), we can say that privacy is respected. In fact the privacy is not equally respected in all of the observed homes for the aged. In some homes employees don't ask for permission to enter the room, people lives in rooms with two, three or even more room-mates and it isn't possible to guarantee the intimacy or there isn't any intimacy (people with dementia are washed while the door is open). Furthermore, the information about people with dementia is sometimes unnecessarily revealed to all employees.

We found out that individualized planning of development (individualized plan) is available to the people with dementia on the middle scale (3.00). In some homes for the aged there are individual plans for each user, which are prepared immediately when entering home, or every year. In other homes the processes of establishing individual plans are still in their initial stage, while in some others there isn't any individual planning at all. In addition to the individual planning there are other possibilities of satisfying the individual needs and wishes: employees take into consideration the suggestions and wishes of a person who cooperates in the activities which are designed for all users; on the basis of wishes, new activities are organized and people are not forced to cooperate in group activities if they don't want to.

Respect for people with dementia, possibility of personal development, respect of privacy and individualized planning of care depends mainly on the employees (the more they are stressed and the less they are qualified, the less individualization of personal development can be observed) and on the stage of dementia (as dementia is progressing people with dementia are no longer treated as respectful individuals and privacy is guaranteed to a smaller extent). Therefore it is necessary to inform the employees that people who cannot express their complaint deserve a greeting and to be addressed formally, to be taken care of properly without being seen by all the others, and to guarantee them basic human dignity. Individualized planning of care is not an activity present in all of the observed homes. Therefore it is necessary to establish procedures of individualized planning whereby people with dementia and their relatives and/or representatives have to be present and cooperate,

especially in the cases where dementia progressed to such extent that a person with dementia cannot even express his or her opinion.

4.5. Social integration

Social integration of people with dementia is present only on a small scale (2.58).

Associating with people who are highly respected in the home is present on the small scale (2.55). There are only few exceptions which show that people with dementia are associating with other users in the homes for the aged. Mainly the associating is limited to organized activities in the home. In some cases people with dementia can associate only with those respected people, who are volunteers or in the cases when people with dementia have a companion who enables them to go to the people who are respected. It is quite often the case that people with dementia cannot even associate with friends from the departments in which they used to live before.

The possibility to use public services is present on a small to middle scale (2.75). In some homes for the aged there are medical services available outside (general physician, eye specialist, dentist, other specialists) and within the facility (general physician on the appointed days or every day); library inside and outside home (usually employees or relatives bring the books from the general libraries outside the home); possibility of visiting church ceremonies and rituals; recreation; stores; restaurants; hair-dressers. Usually the possibility of using public services is limited, due to the fact that only people who are able to walk alone and who do not need escort can go outside. In one of the observed homes only the access to medical services is available.

Social integration depends on the stage of dementia (people with severe dementia cannot express their wishes about services; they cannot use some of the available services or they don't even have any wishes with respect to the services outside the home); on living on a safeguarded department (people who live there have limited possibilities of visiting other users) and on organization of work (due to the small amount of employees they cannot assure escort to all people with dementia who want some public service). We need to find a way of improving the possibilities of contacts between people with dementia and other users who are respected in the home and also others respectful persons outside

the homes (for instance more common performances), and how to extend the possible use of public services (e.g. more escort – with the help of volunteers who will be prepared to escort people with dementia into the library, store, etc.).

5. Conclusion

To summarize the most important findings, we can say that among the principles of quality work in the homes for the aged, good relationships are most obvious (on the middle scale- 3.39), the next is the possibility of personal development (on the middle scale – 3.27), and the possibility of choice (on average a little lower – 3.01; the most outstanding result here is the possibility of managing the finances with the lowest estimate – 1.93). A little bit lower is the principle of participation (2.89) – the impact on services is present only on a small scale (2.29), and the power is not equally balanced (2.27). The lowest is the estimate of social integration (2.58).

Due to the fact that there are no clear rules in the legislation as regards the care for people with dementia in Slovenia and similarly as Melin Emillson (2005: 1405) found out ‘...the staff members themselves experienced unclear formulations of explicit or common goals...’ there are big differences between various homes for the aged regarding the presence of principles of quality work.

The most outstanding factor influencing all the principles was the stage of dementia. If the principles of quality work are present while treating people with ‘mild’ dementia, the presence of principles declines with the severity of disease. Providers of services should not justify this kind of practice in a way that people in the last stage of dementia cannot even express their opinion and wishes and are not enabled to do anything. It is necessary to organize the every-day activities in a way to ensure human dignity.

An important factor, when trying to consider the use of principles of quality work, is the organization of work and employees. In those homes for the aged where there is not enough staff and where the staff do not devote enough time to people with dementia and do not implement special activities for them, the estimates of principles were lower.

In our case the findings of the research present the potential for discussion of how to organize the institutional care for the people with

dementia and as researchers we certainly have had the role as agents '...in the construction of entities through daily practices...and producing... the potential for action or changed action...' (Parker, 2005: 263), especially because of the above mentioned reason that until now there has been the lack of a special act or legislation in Slovenia, defining the basic principles of care for people with dementia. We therefore have the opportunity to influence the development of a more psychosocial and person-centred approach to dementia.

Our suggestions are based on the one hand on the results of various researches, summarized by Chapell and Reid (2000), where the following factors that contribute to better living conditions for people with dementia were identified: staffing, training and special assignment (seem to have impact on reduction of the use of physical restraints and also reduce the amount and inappropriate use of psychopharmacology), rational care planning and programming of activities (individualized care planning is considered to be an important component of quality care), family involvement (it is necessary to involve family members in order to ensure person-centred activities for families past knowledge of the people with dementia), environment (units designed with a continuous wandering loop and fewer residents are related to positive outcomes, for instance increased social interaction). But on the other hand we focus strongly on the shortcomings identified in our own research. First, there should be a consensus of philosophy of principles which lead to a high-quality care for people with dementia, which should be reflected in the respective legislation and only after the recommended principles are implemented into the everyday practice, we will be able to measure the effects on the quality of life of the people with dementia in the institutional environment.

To enlarge the use of principles of quality work when treating people with dementia the advocacy should be guaranteed to all people with dementia in the last stage. Relatives should give all the necessary information regarding interests and wishes of people with dementia. Information about the activities should be given from different sources and privacy during the nursing activities should be guaranteed. It is inevitable to realize that when treating people with dementia more time is required, compared to the other users of home care. Furthermore, various

activities should be organized on the basis of wishes of people with dementia and people with dementia should be treated with respect.

One of the obvious necessities is training. In some homes for the aged only a few employees have undertaken training concerning the development of psychosocial model of care for people with dementia (Flaker, Kresal, Mali, Milošević-Arnold, Rihter and Velikonja, 2004). Comparing this situation to the results of Parkers' (2005) study revealing that even in cases where staff has been trained on the positive approaches to dementia care, this was not seen in their everyday practice due to the fact that there are other factors constructing the meaning of care, it is important that the ethics of social care is promoted through the planned training.

Taylor, Schenkman, Zhou and Sloan (2001) found out, when comparing the total costs of caring for community dwelling elderly persons, that people with a severe form of Alzheimer's disease and related dementias (ADRD) had higher median total costs than people with moderate ADRD or those without it. In the homes for the aged in Slovenia there is no difference in the price for caring for people with dementia, compared to the price of care for the others. This is probably one of the reasons that there is not enough staff that would be able to carry out proper care for people with dementia (more time for each activity, more privacy...). Therefore the price should be reconsidered.

Although Melin Emillson (2005) states that the research results seem not to have a great impact on practice, we hope that our research will influence changes in the institutional environment, especially due to the fact that research results were presented to the field practitioners and they were able to add to or comment upon our proposals.

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SURVEY OF DISORDERED EATING AND BEHAVIOUR IN CHILDREN AND ADOLESCENTS

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Abstract:

Objective: To study obstacles to children's and adolescents' social inclusion. Focus were the associations between body mass index (BMI) and psychosocial problems including those typical for eating disorders. *Method:* 1057 pupils aged 10 to 17 years completed the Youth Self-Report (YSR) and the Eating Disorder Inventory for children (EDI-C). Socio-demographic data and information about height and weight was also gathered. *Results:* The less formal education was reported for the parents, the higher the proportion of overweight daughters. No association between socio-demographic variables and BMI was found in boys. Overweight girls and boys rated themselves as less active in organizations, associations and groups compared to normal weight youngsters. Overweight girls reported a lower number of close friends and fewer social activities outside school.

Underweight girls reported fewer problems than those with normal weight. Overweight girls had higher scores than normal weight girls on six out of eleven EDI-C-scales (drive for thinness, bulimia, body dissatisfaction, ineffectiveness, interpersonal distrust, interoceptive awareness) as well as on the YSR-scales anxious/depressed and social problems. Similarly, overweight boys presented more social problems than those of normal weight and higher scores on the same EDI-C-scales as overweight girls with the exception of interpersonal distrust.

Underweight boys differed from normal weight boys on the YSR in reporting more somatic complaints, but on none of the EDI-C scales. Conclusions: Overweight seems to be an obstacle to social inclusion for children and adolescents. Overweight children and adolescents report psychosocial problems including those typical for eating disorders. Therefore, they require intervention not only for the prevention of medical consequences of overweight and obesity. In the treatment of overweight children and adolescents eating disorder symptoms need to be taken into account.

Keywords: children, adolescents, overweight, psychopathology, social inclusion, social class

Introduction

Obesity and eating disorders can be obstacles to children's and adolescents' social inclusion. A nationwide survey demonstrates the increasing prevalence of overweight amongst children and adolescents in Germany (Kurth & Schaffrath Rosario 2007). The aim of the study was to investigate associations between body mass index (BMI) on the one hand and socio-economic variables and psychosocial problems, including those typical for eating disorders, on the other hand.

Sampling and Methods

Sample of Subjects

1057 10-17 year old pupils (583 girls, 474 boys) were recruited from primary, basic, high, grammar, comprehensive and Rudolf Steiner schools in the German state North-Rhine-Westphalia (see Table 1 and Figure 1). The proportion of pupils from the different types of schools is roughly representative of the German school system. Concerns raised by the data protection agency mean that we do not have data on the number of non-participants in the schools that did take part. It is likely that immigrant families are under-represented as the ability of the pupil and at least one of their parents to read German was necessary for participation. All subjects and the parents of legal minors gave written informed consent.

Measures

The *Youth Self-Report* (YSR, Achenbach 1991a, Döpfner et al. 1997a, b) measures self-reported ratings of behavioural and emotional problems. It was modelled on the *Child Behavior Checklist* (CBCL, Achenbach 1991b). The YSR can be used for ages 11 and up and the items are worded in the first person. It includes 112 items, each to be rated according to a 0 to 2 point scale ranging from 'not true' to 'exactly or often true'. The YSR yields scores on the following eight syndrome scales: social withdrawal, thought problems, somatic complaints, attention problems, anxious/depressed, delinquent rule-breaking behaviors, aggressive behaviors, and social problems. The total problem score subsumes the eight syndrome scales. The three syndrome scales, (withdrawal, somatic complaints and anxious/depressed) constitute the broad band internalizing scale. The syndrome scales (delinquent rule-breaking behaviors and aggressive behaviors) comprise the broad band

externalizing scale. Good reliability and validity of the YSR have been replicated for the German versions (Döpfner et al. 1995, Schmeck et al. 2001).

The *Eating Disorder Inventory for Children* (EDI-C, Garner 1984) is a self-rated questionnaire including 91 items, each with a choice of 6 answers from 'never' to 'always'. The EDI-C yields scores on the following 11 subscales: drive for thinness, bulimia, body dissatisfaction, ineffectiveness, perfectionism, interpersonal distrust, interoceptive awareness, maturity fears, ascetism, impulse regulation, and social insecurity. The total problem score subsumes the 11 subscales.

Height and weight

The pupils themselves reported body weight in kilograms (kg) and body height in meters (m). We did not measure the pupils as their completion of questionnaires during class took up considerable teaching time and additional weighing and measuring body length would probably have led to even more refusals by heads of school to permit the study in their institution. BMI was calculated from these measures (BMI = body weight in kg/ body height in m²).

Statistical Analyses

Children rated below the 10th percentile were treated as underweight, and those above the 90th percentile as overweight (Kromeyer-Hauschild et al. 2001).

Results

No association was found between BMI group and gender of subject, current work of mother or father, or parental education for boys. In girls however, the prevalence of overweight increased with decreasing parental education. Regarding the association between BMI and the type of school attended by the subject, we found significant differences only for girls with the highest prevalence of underweight in high schools and the highest prevalence of overweight in basic and comprehensive schools (see Figure 2).

Underweight girls reported fewer problems than those with normal weight. Overweight girls scored higher than normal weight girls on the YSR scales anxious/depressed and social problems (see Figure 3). Overweight boys scored higher than normal weight boys on the YSR

scale social problems, underweight boys on the scale somatic complaints (see Figure 4).

Overweight girls scored higher than normal weight girls on the following 6 out of 11 EDI-C scales: drive for thinness, bulimia, body dissatisfaction, ineffectiveness, interpersonal distrust, and interoceptive awareness (see Figure 5). Overweight boys scored higher than normal weight boys on the same EDI-C scales as overweight girls with the exception of interpersonal distrust (see Figure 6).

Analyses of covariance with age as covariate see Table 2.

Discussion

Psychological problems have been found in many children and adolescents referred for obesity (Zametkin et al. 2004). In France, higher CBCL total T-scores, internalizing T-scores, externalizing T-scores, and *anxiety/depression* sub-scores have been found in obese compared to diabetic child and adolescent out-patients (Vila et al. 2004). Child Depression Inventory scores of obese patients were negatively correlated with their BMI (Vila et al. 2004). In Turkey, even non referred obese adolescents had significantly higher mean CBCL total problem scores and scores for *social problems* and internalizing behaviour compared to a normal weight controls (Erermis et al. 2004). In Western Australia, overweight (including obese) 7 – 13 year old primary school children with high levels of shape and weight concern were at particular risk for psychological problems (Allen et al. 2006). No information is available to indicate the causal direction of the association. There may well be a bi-directional effect.

Limitations of this study are that the participating schools were not randomly selected. Another limitation is that we did not weigh and measure the pupils. However, in one American study BMI measures based on self-reported and measured weight and length were highly correlated ($r=.85$ for girls and $r=.89$ for boys) (Neumark-Sztainer et al. 2006).

Conclusions

Compared to normal or low-weight children, obese youngsters have higher ratings on general psychopathology and on problems typical for eating disorders. Further studies should examine the direction of this

effect. Assessment of obesity should include attention to psychological symptoms.

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Table 1
Number of pupils recruited at different schools

Type of school	Number of pupils
Primary (Grundschule)	30
Basic (Hauptschule)	209
High (Realschule)	294
Grammar (Gymnasium)	145
Comprehensive (Gesamtschule)	261
Rudolf-Steiner (Waldorfschule)	87

Table 2
Analysis of covariance with age as covariate

YSR-scale	Factor	Result	F	P	η^2
Social withdrawal	Sex	Girls > boys	9.94	<.01	.01
Somatic complaints	Sex	Girls > boys	5.48	<.05	<.01
Anxious/depressed	Sex	Girls > boys	5.86	<.05	.02
Anxious/ Depressed	BMI	Boys: hardly any differences between BMI-groups. Girls: increase especially from normal to overweight	4.79	.01	.01
Delinquent rule-breaking behaviors	Sex	Boys > girls	17.74	<.01	.02
Aggressive behaviors	Sex	Boys > girls	6.61	.01	<.01
Aggressive behaviors	Inter-action BMI/sex	Girls: increasing with BMI; overweight girls = overweight boys. Boys: underweight > overweight > normal weight	3.15	<.05	<.01
Social problems	Sex	Boys > girls	5.61	<.05	<.01

Table 2 continued

Analysis of covariance with age as covariate

YSR-scale	Factor	Result	F	P	η^2
Social problems	BMI	Girls: increasing with BMI. Boys: in underweight almost as much as in overweight	4.46	<.05	<.01
Attention problems	BMI	Girls: overweight >> normal weight > underweight. Boys: over and underweight > normal weight.	3.89	<.05	<.01
Drive for thinness	Sex	Girls in every BMI-group more than boys	58.14	<.01	.05
Drive for thinness	BMI	Increasing with BMI, especially from normal to overweight	37.85	<.01	.07
Drive for thinness	Interaction BMI/sex	Within the sexes overweight >> normal weight and underweight	3.21	<.05	.01
Bulimia	Sex	Within the same BMI-group girls > boys	7.36	<.01	.05
Bulimia	BMI	Within the same sex overweight > normal and underweight	25.67	<.05	.01
Body dissatisfaction	Sex	Within the same BMI-group girls > boys	46.59	<.01	.05
Body dissatisfaction	BMI	Within the same sex overweight > normal and underweight	57.20	<.01	.10
Ineffectiveness	Sex	Within the same BMI-group girls > boys	30.77	<.01	.03
Ineffectiveness	BMI	Within the same sex overweight > normal, underweight	12.32	<.01	.02

Survey of Disordered Eating and Behaviour in Children and Adolescents

Perfectionism	Interaction BMI/ sex	Decreases in boys, increases in girls with increasing BMI	3.19	.05	<.01
Interpersonal distrust	BMI	Girls: most in the obese. Boys: least in normal weight	3.67	<.05	<.01
Interoceptive awareness	BMI	Within the same sex overweight > normal, underweight	9.50	<.01	.02
Maturity fears	Sex	Girls > boys	6.74	.01	<.01
Social insecurity	BMI	Overweight > underweight > normal weight	5.11	<.01	.01

Figure 1
Number of girls and boys of different ages in years

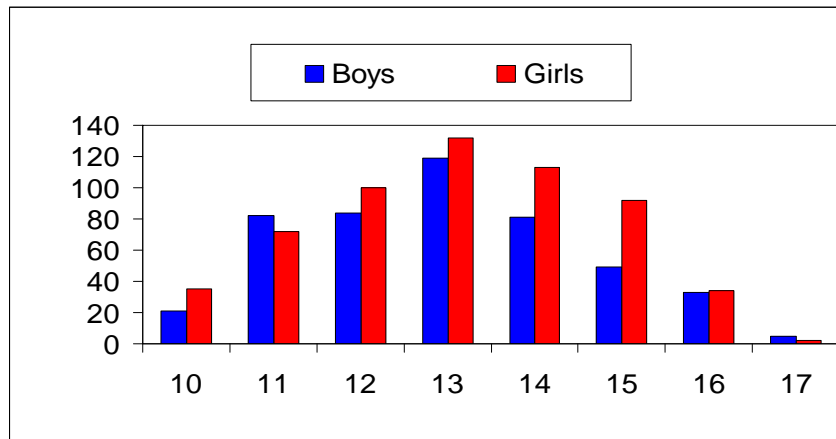


Figure 2
BMI and type of school attended by girls in percent

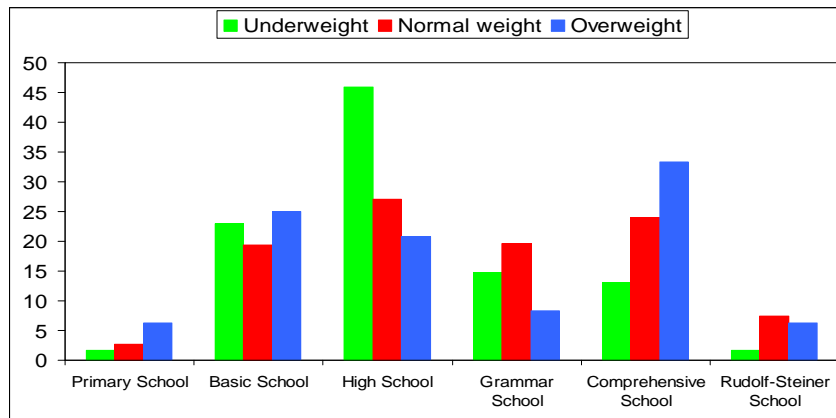
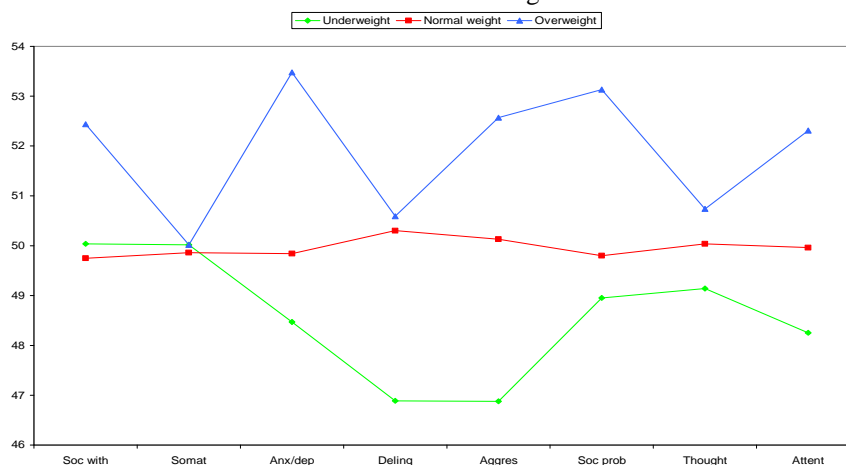
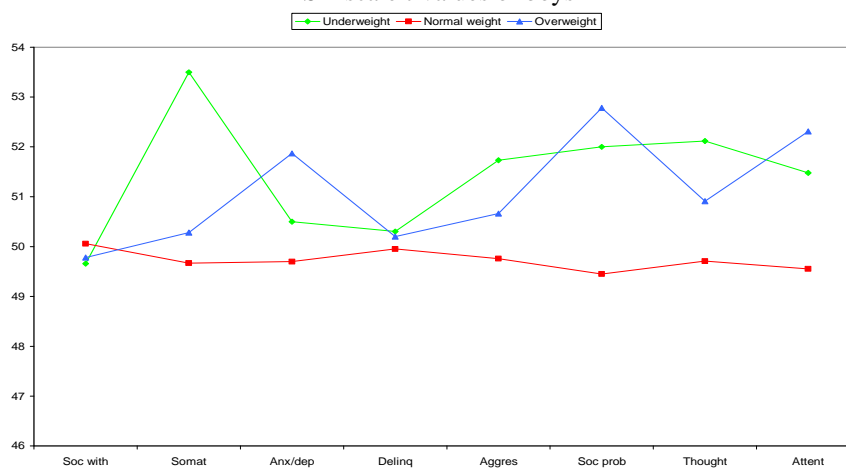


Figure 3
YSR-scale t-values of girls



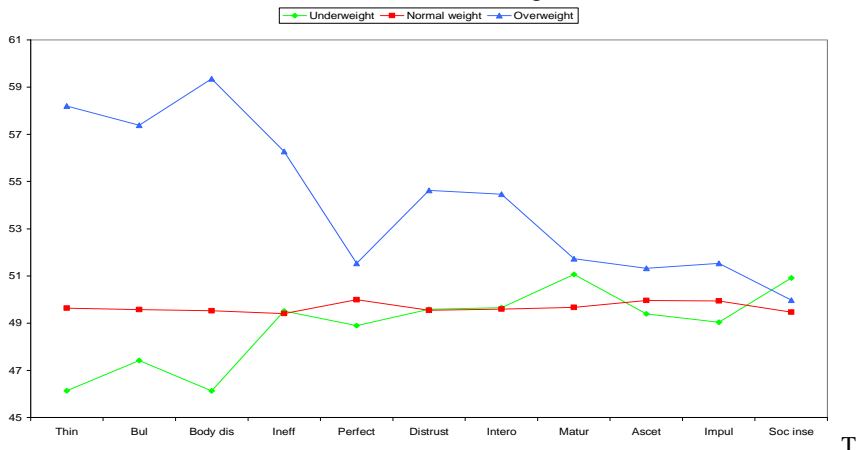
Soc with = social withdrawal; Somat = somatic complaints; Anx/dep = anxious/depressed;
 Delinq = delinquent rule-breaking behaviors; Aggres = aggressive behaviors;
 Soc prob = social problems; Thought = thought problems; Attent = attention problems

Figure 4
YSR-scale t-values of boys



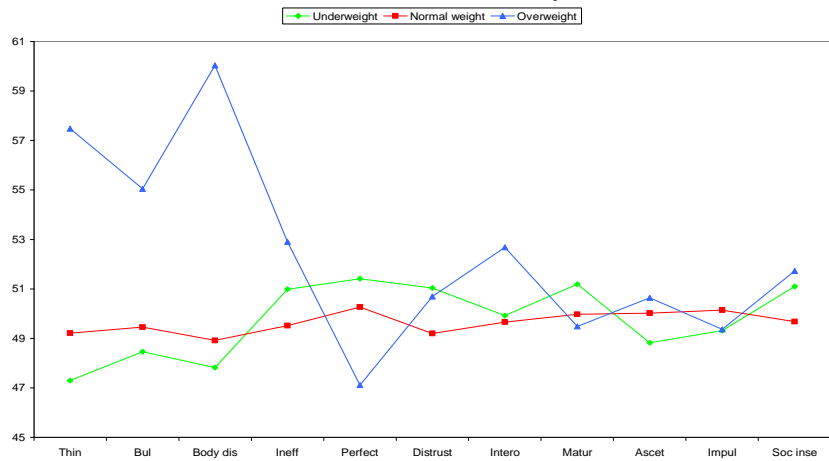
Soc with = social withdrawal; Somat = somatic complaints; Anx/dep = anxious/depressed;
 Delinq = delinquent rule-breaking behaviors; Aggres = aggressive behaviors;
 Soc prob = social problems; Thought = thought problems; Attent = attention problems

Figure 5
EDI-C-scale t-values of girls



Thin = drive for thinness; Bul = bulimia; Body dis = body dissatisfaction;
 Ineff = ineffectiveness; Perfect = perfectionism; Distrust = interpersonal distrust;
 Intero = interoceptive awareness; Matur = maturity fears; Ascet = ascetism;
 Impul = impulse regulation; Soc inse = social insecurity

Figure 6
EDI-C-scale t-values of boys



Thin = drive for thinness; Bul = bulimia; Body dis = body dissatisfaction;
 Ineff = ineffectiveness; Perfect = perfectionism; Distrust = interpersonal distrust;
 Intero = interoceptive awareness; Matur = maturity fears; Ascet = ascetism;
 Impul = impulse regulation; Soc inse = social insecurity

CHILD PROTECTION WORK WITH ETHNIC MINORITIES; SOCIAL INCLUSION OR CULTURAL OPPRESSION

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Abstract:

The intention of the social welfare system is to increase the living standard of the clients, to solve specific problems and to avoid abuse, mistreatment or neglect of children, which is the case of the child protection law and services in Norway. The definition of which behaviour that can be classified as such, is not culture neutral but a reflection of the dominant culture and values in the given country. The intervention of the child protection system; particularly the forced public custody, may be part of a general cultural oppression of a given minority.

This aspect of child protection act in Norway will be investigated through the historical comparison of the welfare policy towards the sami population and the romani minority (Norwegian travellers) in retrospect and the present case of the new immigrant minorities.

Both the sami population and the Norwegian romanis share some common features. They are today defined as national minorities by the Norwegian authorities, they have a different language, and they are migratory populations, this phenomenon usually pose a problem regarding the majority's concept of good child care and the idea of childhood.

The main principles for the welfare policies in the 60ies and the 70ies was a "norwegianisation" of the sami population and a oppression (extinction) of the romani culture.

Principally almost all romani children where taken from their families from birth and sami children were not allowed to speak their mother language in school. These measures where interpreted as part of the child protection.

Today the immigrant families are overrepresented as clients of the child welfare system in Norway. This fact can be interpreted as a forced integration of ethnic minorities as was the case in the last century with the sami and romani populations.

The interviews with child protection workers in Trondheim community dealing with immigrant families will be used as empirical basis for a description of the present situation.

Keywords: Child protection, ethnic minorities, national minorities, immigrants, social inclusion, cultural oppression

General Introduction

This article investigates the Child Welfare Act (1953 and 1992) in Norway in an historical and contemporary perspective as a means to integration of the Minority Population in the main culture. Particularly the child welfare policy in relation to the Sami population and the Roma minority in retrospect and the present case of the new immigrant minorities will be studied. The main thesis is that there exists a historical continuum or a cultural modus in the way a given society treats its minorities.

The intention of the Social Welfare System is to increase the living standard of the population; to reduce specific problems and to avoid abuse, mistreatment or neglect of children, through political principles, preventive work and work with individuals which is the case of the child protection law and services. The welfare system through the social worker use both incentives and sanctions to protect the child and increase its living standard. This statement becomes problematic when different cultures have different perceptions of what is a good living standard and what is the good life for the children.

The meeting between an ethnic majority and an ethnic minority is likely to provoke changes in both cultural systems, changes that may be forced or voluntary or changes that just happens as a "natural" result of the interaction. The relation between the two cultural systems can also be interpreted as a power relation where one of the systems, in most cases the dominant majority culture uses different strategies to manipulate and to change the minority culture. The purpose of this manipulation can be to assimilate the minority culture in the main culture, or on the other hand to exclude the members of the minority culture in order to minimise their influence or if the minority culture is very weak, small or unwanted to eradicate this culture.

The outcome of each strategy will be that the majority culture can continue its functional mode in the same way as before.

Specific introduction

This paper will explore some historical and recent strategies of social inclusion / integration, in particular how the Child Policy and Child Protection Act in Norway has been used in this integration process. This aspect will be investigated through the historical comparison of the welfare policy, particularly the Child Protection Act as an element of the general integration policy towards the Sami population and the Romani minority (travellers) in retrospect and the present case of the new immigrant minorities.

Some cases from the historical relation between the Sami culture, the traditional Gypsy traveller culture, some of the new immigrant cultures and the dominant Norwegian culture will be explored. It is normal to think that some historical continuum will exist in the way a given culture treats its minorities, and that we will find some of the same strategies repeating themselves, and that the evaluation of different strategies of integration work may be useful for the development of good integration policies in the future.

First we will explore the notion of culture sensitive perception of welfare and child interest and the notion of power in cultural encounters and go on to explain the main purpose of the child protection act and give some examples of its application in different areas and finally raise some questions about alternative strategies of application of child welfare systems in a multicultural society namely the possibility of a culture relative child welfare system.

Culture sensitive perception of living standard and child abuse

The perception of living standard is culture sensitive, e.g. the differences in lifestyle between migrant populations as the gypsy traveller or the Sami have obviously frequently created conflicts between the migrants and the sedentary or farming majority.

The definition of which behaviour that can be classified as abuse, mistreatment or neglect of children, is not culture neutral but a reflection of the dominant culture and values in the given country. The intervention of the Child Protection System; particularly the forced public custody, may be looked upon as part of a general cultural integration policy or oppression of a given minority as well as a protection of the child from the point of view of members of different cultural value systems. The fact

of children being a part of a migrant culture may be considered as a threat to the welfare of that child in itself. This might also be the case of members of different religious cultures, members of cultures with different tolerance of violence, or sexual behaviour.

Power relation

The notion of power is central in the analysing all intercultural communication.

The different way power is produced and reproduced between cultures and in communication between members of different culture is analysed in Jensen 2006.

The power analysis can be exemplified as a dominance in number and expansion in a certain area, in tradition and former historical relations (colonial or occupational relations between nations), in economy and in formal authority.

The power relation is immediately recognized or imposed in the communication between two representatives of different cultures (ibid), and will most likely predict which of the two will be most likely to change or adopt behaviour or language in the given situation.

The relation may be a result of a long historical tradition of colonialism, of economical exploitation, of construction of race or of construction of superior or inferior ways of living or culture, or the power relation may be constructed in the moment by economical power, by language, by knowledge of how the social system (and particularly the social service system) is managed.

The notion of power is particularly important both to understand the relation between the minority and the majority and between the social worker and the client

The Dominant culture

A frequently used description of the recent development of the Norwegian society is a description of a society that has moved from an egalitarian, mono-cultural and homogenous society in the sixties to multicultural and diversified society in the new millennium, a development not very different from many other traditional societies in this period. The ethnic and cultural minorities have always been relatively small in numbers and in influence.

The image of homogeneousness of the society in the sixties is often hiding the fact that the minorities were subject to strong and dramatic oppressive integration policies like forced sterilisation, lobotomy, prohibition of use of mother language in school and prohibition of other native cultural expression in public areas. The purpose of this article is to show how the child protection system can be analysed as a part of the integration policy for example through the use of forced public custody in a general manner towards cultural minorities and in particular the Rom travellers.

The Sami population

The Sami population is a traditional indigenous ethnic minority that populated the northern regions of Scandinavia and Russia before the settlement of the Norwegians and the cultural expression is also distinctly different from the main population. The population is traditionally a seasonally migratory population following the drifting of the reindeer. Today Norway has two official languages, Norwegian and the Sami language that are distinctly different. Approximately 25 000 people in Norway speak the Sami language, (European charter for regional or minority languages 2002, Sami Language Council 2000).

Romani people (Travellers)

The Travellers has been a part of the Norwegian culture for many centuries and an estimation of 2 000-3 000 Romani people / Travellers are living in Norway. Romani is their language, and Today Romani is considered a non-territorial minority language in Norway. The number of speakers of Romani has been estimated to from some hundreds to some thousands. (European charter for regional or minority languages, 2002)

The new immigrant groups

The immigrant population in Norway counts for 8% of the population from about 200 countries (SSB) and can hardly be described by any common feature. Both the immigration and the integration policy are vividly discussed, particularly the social rights, services and the cultural influence.

Empirical part; Two historical examples

Both the Sami population and the Norwegian Romani travellers share some common features. They are today defined as national minorities by the Norwegian authorities, they have a different language, and they are migratory populations; and they are expressing distinct different cultural values than the majority culture, this phenomenon usually pose a problem regarding the majority's concept of good child care and the idea of childhood.

The main principles for the integration policies in the 60ies and the 70ies was a "norwegianisation" of the Sami population and a extinction policy of the travellers culture.

Norwegian authorities integration policies towards the Sami population

The Sami population has been subject to or victims of the policies of different historical regimes. There has been conflicting interest related to territory, grazing land and religion.

From 1900 till the end of the 1960'ies the main principles of this policies / the main goal of the official policy was the principle of Norwegianisation. The main element of this policy was to impose the Norwegian language to this population through the compulsory school system where only the Norwegian langue were allowed until 1967, and with a corresponding prohibition of use of the Sami language and particularly the Sami chanting (the joik), that was forbidden in public space. Still today in some Norwegian communities, there should be made a formal application to the police to practice the joik in public places.

The result of this policy where of course that the Sami language at a moment had a low respect and a very limited expansion and use. But has regained some of it's expansion the last decades.

The situation in many Sami families in the 60ies and the seventies may be compared to the situation in many immigrant families today. The grand parents speaking Sami, the parent generation being bilingual, and the children having adopted the majority language.

There has been very sparse formal research of the relation between the Child Protection System the Sami population.

The integration policy towards the Sami child population where managed at different arenas; Christian missionary organisation, cultural policy, and school policy and territorial rights.

Integration policy relative to the Romani population

The integration policy relative to the Romani population has some similarities to the Sami population but the measures were even more dramatic and the child protection services played definitely a more decisive role. The goal of this policy may be expressed more as an extinction policy than integration.

First it important to understand that the Romani policy in Norway were delegated to a Christian “mission among the homeless” that for a long period had extended rights to

Organise the public policy in this area, and the expressed aim of this policy was to extinguish this culture.

The travellers in Norway were subject to a systematic sterilisation policy, it is documented that at least 128 persons were sterilised by force in the period from 1934-1977. The number of undocumented cases may be far higher. One of the decisive strikes to this culture was the prohibition of keeping a horse in 1951 due to the animal protection legislation.

The Child Protection Act and services played a very central position in this policy.

Principally almost all children of Romani travellers where taken from their families from birth and placed in child institution or in foster homes without knowledge of their cultural origins. These measures included at least about 1500 children and the Mission had the principal view that the maximum possible of children should be taken from the “travellers” and raised to a life as permanent settlers, as the culture of the travellers were described as “provocative”. (St. meld. nr. 15 (2000-2001)s 31).

“What we are doing is consciously to eradicate a peoples culture, their language and their way of living” Pastor Knut Myhre, principal of Svanviken working colony for travellers in an interview to the journal “Aktuell” i 1963.

Today this culture is hardly visible in the Norwegian society and members of the Romani culture are reluctant to identify themselves as

such, even if some initiatives are taken to revive some of the traditional living. A tentative conclusion is that the strong assimilation strategies have been 'successful' and that the motive and the application of the Child Protection System can be wider than the strict welfare of the individual child.

Integration policies relative to the new minorities

It is more difficult to generalise on the recent integration policy because it is more diversified and the population affected is definitely more heterogeneous regarding both cultural values and motive for emigration. If we compare the integration policy today with the integration policy towards the Sami and the Roma in the 60ies, the methods in use have definitely changed, in some respects the aims are the same.

The language question is still important; 'Knowledge of language is an important precondition for active participation in society. From September 2005 it is compulsory for newly arrived adult immigrants to participate in 300 lessons of Norwegian language training and social studies (Introduction Act 2006). The compulsory aspect of this training shows that this norwegianisation may be more important to the ruling majority than to the immigrant. The role of the child protection system in the integration policy may still be relatively important.

Different international studies shows that the probability of a minority family, a poor family or an immigration family to become a client in the child protection service is far greater than among the majority population (Denby et al. 1998, Clark and Gilman 2007) In the US The probability of a Black Non-Hispanic of being in foster care is more than double relative to their population percentage, The probability of a white Non-Hispanic US citizen of being in foster care is less than half relative to their population percentage.

The minority and immigrant families are heavily overrepresented as clients of the child welfare system also in Norway. (St meld nr 17 (1996-97), Salthe og Thomsen 1991 s.32, Bystyremelding 1996)

The different explanations of this tendency range from

- properties with the immigrant minority family e.g.;
- 'greater tolerance and prevalence of violence',

- 'stress related to the establishment in and adjustment to a new culture',
- the correlation between minority cultures (and/or ethnicity) and poverty.
- through communicational aspects between the minority population and the helping system e.g.;
- lack of understanding in the immigrant family of how the social system is functioning and
- lack of understanding in the social services of how the immigrant family is functioning.

The research done by Ertsmann (1994) in Copenhagen, Denmark in 1990 shows that forced custody of children among immigrant is more often overruled by the court than similar cases among the majority population. This may indicate some cultural prejudice among the social caseworker. That results in more severe measures towards the ethnic minorities. This fact can be interpreted as the social services plays a role in a forced integration of ethnic minorities as was the case in the last century with the Sami and Roma populations.

Some questions should be raised related to the application of the Child Protection Act in multicultural societies;

Should a child protection system have different standards or approaches relative to different cultures?

Or to what extent should the differences in culture be respected in child protection application?

Should placements in foster care be relative to or be sensible to the child's cultural origin? (e.g. placements in foster homes of similar cultural origin)

Should child protection workers have an overall integration or assimilation aim with their practice?

Long term trend in inclusion of cultural minorities

There may be possible to identify some long term trends in cultural inclusion of cultural minorities that are relatively consistent.

- Importance of language and forced language training seems to be important in all relation between a majority and a minority culture.

These forced language integration measures may be in opposition to the European charter for regional or minority languages that expresses “the need for resolute action to promote regional or minority languages in order to safeguard them” (European charter for regional or minority languages, 1992)

- The importance of the child protection system in the integration process and an overrepresentation of the minority children in cases where the social services uses forced measures in the family.
- Acceptance of cultural diversity may be different according to the history and experience with minorities in the society.

These trends may be starting points for a more exhaustive research of the child protection services role in the integration of the minorities in the society and how the child protection system can develop a practice that is not culturally biased.

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WHAT'S BEST FOR THE ELDERLY?

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Abstract:

Historically, care for the elderly evolved from family care to workhouses, poorhouses and homes for the aged, which were often overlapping, if not identical. In place of, and sometimes alongside, these arrangements, nationality – usually immigrant – groups, ethnic groups, labor unions and affinity groups began sponsoring homes for the aged, usually for their members. Governments, sometimes in concert with non-profit or humanitarian groups, next entered the scene, providing institutions – which tended to be minimal -- for the elderly. With rising prosperity came homes termed assisted living facilities (ALF) that provided private apartments and basic services – meals, housekeeping, maintenance and light medical assistance -- to those who could afford them. More recently there began the use of non-relative carers who share the housing of the aged. This article will briefly trace this evolution, but dwell mainly on the experiences of assisted living facilities and live-in carers, and combinations of these, as developed in Israel.

Keywords: elderly, housing, personal carers

With the rapid and continuing increase of life expectancy throughout most of the developed world, the problem of proper care for the rising number of the aging has become an issue in many countries. Today, one out of ten persons is aged sixty years or more (Horl, 2006); by 2030, one out of eight will be sixty-five or more (Browne and Braun, 2008); and by 2050 one out of five will be sixty years or older (Horl, 2006). By 2050, the number of people 85 or more will increase by 350% (Browne and Braun, 2008).

Concern for and about the elderly has deep roots, as witness the Biblical Psalmist's plea: "Do not forsake me in my old age." Historically, services for the elderly have taken many forms and been offered under

many auspices, with both forms and auspices tending to supplement, rather than replace, earlier versions. Thus, tribal care was supplemented by dependence on the family, which in some countries is still the primary source of help for the elderly (Bettio and Plantenga, 2004). For example, volunteers and families offer eighty percent of the help given the elderly in Ontario (Litwin and Lightman, 1996).

However, families themselves often need help, as capitulated in the Yiddish aphorism that two parents can support eight children, but eight children cannot support one parent. This need has been recognized, at least in the United States, where there has been established a National Family Caregivers Association. Families are also helped by church groups, guilds, humanitarian organizations and self-help groups, among others.

Governments entered the field on both the local and national levels, and non-profit organizations, including cooperatives, have also become important elements engaged in care for the elderly. The most recent innovation is the entry of for-profit organizations into the field, including insurance companies.

The type of help offered by governments usually includes finances – - through direct grants, pensions, subsidies, supplements and in - kind benefits – and health services. Housing of various kinds is also provided in many places, although in the early days there was often little distinction between institutions for the aged, for the poor, for the sick, and for criminals. The housing provided for all of these was usually of minimal standard, and sometimes less. There still exist governmental provided, subsidized or supported housing for the elderly termed variously congregate housing, senior housing, or subsidized housing. However, in many places government policy now is designed to reduce the number (and burden) of what has been called “social housing,” and efforts have been undertaken to strengthen the private sector in this area (Wah, 2006).

Types of housing arrangements for the elderly exhibit a bewildering variety. They differ as to whether there are several people in a room, one person in a room, suites, or large apartments. They differ as to the services offered, including or excluding housekeeping, meals, maintenance, transportation and amenities, including swimming pools, gyms, social activities, group trips, etc. A further distinction can be made

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as to the extent to which health services, if any -- minor first aid, long-term care and/or skilled nursing care -- are offered occupants. They also differ in their financial structures, ranging from outright purchases to down- payments that are not returned, those that are returnable but depreciate with time, those that add a monthly fee, and those that are available for what is only the equivalent of monthly rental. In Israel a deposit ranging from \$70,000 to \$200,000 is usually required for private Assisted Living Facilities, with various arrangements concerning repayment of all or part of the deposit to the heirs, and monthly payments in addition (Meyers, 2007). There are also some less expensive provisions provided by volunteer and/or philanthropic groups. In the United States, as another example, there are settings in which no down-payment or deposit is required, but only that which is in essence a maintenance fee.

As a consequence of these disparate arrangements, it is very difficult to define the totality, or even parts, of residential care. For example, many such institutions are termed Assisted Living Facilities (ALF), which Hunter (2003) terms a hybrid between skilled nursing services and independent housing units. She points out that there is “no national definition for assisted living...the definition varies widely.” In the United States the 1965 Medicare and Medicaid statutes distinguished between “skilled nursing care” and “intermediate care facilities” (Wahrach, 2008). Bernard, *et al*, (2007) agree that not only is there no universal or shared definition, but that no single model dominates. Cohen and associates (2007) have differentiated between seven types of retirement living arrangements.

The difficulty of arriving at an acceptable definition of elder housing is compounded by the equally difficult problem of defining care. “There remains a lack of consensus about the meaning of the term...it is a slippery term to define precisely” (Fine, 2007). Attempts range from, “Activity that includes everything we do to maintain, continue and repair our 'world' so that we may live in it as well as possible” (Fine, 2007), to “Care means the unpaid duty of women” (Fine, 2007). Care for the elderly is doubly compounded by the confusion between aging as a health problem, as natural physical development, as a social problem and as an individual problem. The difficulty is similar to that of distinguishing between physical and mental illnesses (Kershaw, 2008). As Palley and

Rozario (2007) remark: “Frail older people and people with disabilities may be identical.”

Regardless of these semantic problems, it has been found that, pragmatically, moving from one's own home to another location -- even to another home -- often creates psychological and social trauma. Consequently, the vast majority of older people wish to remain in their current homes, *i. e.*, “ageing in place” (Bernard, *et al*, 2007). However, it would be a mistake to assume that all of the elderly desire to stay in their own setting, with or without outside care-workers. Some adults prefer nursing homes or assisted living facilities over independent living (Zendall, 2007).

Reasons for leaving one's setting may include the inadequacy of available care, difficulties encountered by the family member caretaker, fear engendered in the current location (Bernard, *et al*, 2007), transportation difficulties, or simply to be close to children who live elsewhere.

Enabling frail older persons to remain in their homes as long as possible became policy in Britain in the 1960s (Litwin and Lightman, 1996). This was part of the burgeoning community services movement -- a movement that at one time was attacked as “moving people into community care within a community that doesn't care.” On the other hand, building, maintaining and staffing institutions is expensive, made more so by handsome profits for investors (Meyers, 2007). In New York State, supportive services for the elderly forestalled 460 hospital and 317 nursing home stays, saving over \$10 million (MacLaren, *et al*, 2007). For these reasons, many countries have moved toward adding domiciliary care to their repertoire of help to the aged.

The term “domiciliary,” as well as its opposite, “residential,” is somewhat misleading, for although domiciliary clearly means help given in one's domicile, or home, so could residential care mean that given in one's residence, which is also home. However, “domiciliary care” usually means help given at home, whereas “residential care” usually means institutional. The term “domiciliary care” does not, in itself, distinguish between help given by family members, by volunteers, or by paid workers (Ellis, 2006). For both psychological and public relations considerations, institutions for the elderly have often been termed “homes for the aged.” Thus, “homes for the aged,” came to mean institutions

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rather than individual residences. The term “facilities” for the aged now seems in more general usage.

There has also developed an in-between setting which is referred to in Israel as “protected housing.” In these cases people remain in their own homes, generally in an apartment, and co-operatively arrange for maintenance, minor repairs, cleaning of public areas, social events (including group attendance at theatres, etc., with transportation provided). There is often a nurse in attendance, and a doctor on call. In a few cases this model has broadened to what are termed protected neighborhoods, in which people living in their own houses or apartments join with others near-by to obtain these services. These have been termed “Naturally Occurring Retirement Communities” (NORC) in which neighborhoods become almost empty of younger people, or become a circumscribed ethnocultural area of older people (MacLaren, 2007). Retirement villages are basically a variation on protected neighborhoods, and may consist of individual houses or apartment houses, but are usually chosen rather than naturally occurring. Protected neighborhoods and/or retirement villages may be seen as “age-prepared communities,” or, “elder-friendly communities” (Allen, *et al*, 2007).

Another variation in this area is the so-called Dom Care program, exemplified by the 1975 law in Pennsylvania in which individuals take into their homes persons who need help with the activities of daily living, and are paid a fee determined by law (*Domiciliary Care Program*, 1978).

It should also be noted that lack of care-workers, especially in rural areas where the elderly tend to be sicker and more disabled than their urban counterparts (Bien, *et al*, 2007) has led to experiments with telephones and other electronic devices, both to help the care-workers and the elderly (Dollinger, *et al*, 2006; Demiris, *et al*, 2007). Israel has a telephone health information service open to the general public and personal alert devices for the elderly, as do many countries.

Domiciliary care in Israel is rooted in the health care experiences related to the Nursing Care Law of 1988. Under this law, elderly persons housebound and/or unable to carry out the activities of daily living (ADL), and below a specified income level, can apply for household/nursing help. When certified by a team consisting of a doctor, a nurse and a social worker, the person is entitled to a home-care worker for a number of hours per week – as determined by the team – paid for by the National

Insurance Institute (Israel's version of Social Security). In some cases care-workers might be hired directly by the elderly person, and paid by them (Fine, 2007).

Use of care-workers is inhibited in the United States by the fact that Medicaid, which is limited to help for the poverty-stricken, does not pay for domiciliary care. "These payments have been strictly confined to care provided in institutional settings" (Kelley-Gillespie and Farley, 2007).

The health care arrangements mentioned above, although helpful to many individuals, did not suffice in Israel either quantitatively or qualitatively. Since 1955, Israelis over 65 have increased more than sevenfold and account for ten percent of the population. There are also ten times more "old-old," i.e., those over seventy-five, than there were in 1950 (Meyers, 2007). It was also found that the needs of the aging are not limited to health-care, as strictly defined, and that activities of daily living could not be confined to a few set hours of the day. Indeed, the aforementioned confusion as to whether aging is – or gives rise to – health difficulties; whether it is simply a phase of life; or a social, economic or psychological condition; or combinations of some or all of these, exhibits itself in the differential sponsorship of governmental services for the aged throughout the world, which may involve ministries of health, social welfare, housing, finances, immigration, labor and others.

With increasing costs for residential treatment the need for full-time in-home care for the elderly became acute. For example, in New York seven-day twenty-four hour home-care costs about \$35,000 a year, while nursing home care is about \$90,000. Since, however, home-care jobs fall below that which has been termed "the acceptance level of native workers" (Bettio, *et al*, 2006), the use of live-in foreign workers has become an alternative to residential care in many countries. This innovation is relatively recent. As late as 2006 it was said, "Nobody has yet found acceptable answers as to how to deal with the 'care gap' and how elderly people could be enabled to continue living in their own homes...without annihilating the (female) family's carers' aspiration to full participation in social life" (Horl, 2006).

In Israel, on the other hand, the Nursing Care Law was approved by the government of Israel in 1988, and arrangements were made for the

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arrival and employment of foreign care-workers. These arrangements included the authorization of for-profit manpower companies to provide the necessary workers, under governmental permission and supervision. Prior to the enactment of the Law, about half the home care was delivered by voluntary organizations and the other half by self-employed workers recruited by families. Since the advent of the Law, about two-thirds of care-workers are supplied by private agencies (Litwin and Lightman, 1996).

There does not seem to be any general agreement as to how such employees should be termed. In the literature one finds minders (Bettio, *et al*, 2006); cohabitating minders (Bettio, *et al*, 2004); foreign minders (Bettio, *et al*, 2006); careworkers, (Piperno, 2007); caregivers, (Litwin and Lightman, 1996; Meyers, 2007); care migrants (Bettio, *et al*, 2006); domiciliary care workers (Litwin and Lightman, 1996); nurses (Sinai, 2008); and direct long-term care (DLTC) workers (Browne and Braun, 2008).

Regardless of terminology, these companies now send emissaries abroad to recruit workers and in some cases have established offices for this purpose in foreign countries. These offices work in coordination with Israeli embassies abroad in terms of selection, training and travel arrangements, including visas. Many of the countries participating in this international arrangement encourage workers to go abroad, and even offer them pre-training, since the remittances sent by workers to their native homes has become an important source of hard currency for many of them.

In the Philippines, about ten percent of the gross national product comes from remittances by Filipino workers abroad. The government has established more than 150 training centers for caregivers to children and the elderly abroad, who work in about 140 countries (Piperno, 2007; Browne and Braun, 2008). It is estimated that 85% of Filipino health care professionals are working overseas (*Manila-Tel Aviv*. September 4, 2007).

The number of foreign care-workers in Israel is presently estimated at 52,000 – a number which is expected to reach 100,000 within five years (Sinai, 2008). In Italy, it is estimated that about half a million foreign workers (90% of them female) are working with families,

although it is not clear how many of these work as care-workers for the elderly (Bettio, *et al*, 1996).

Once in Israel, foreign workers are protected not only by the general laws, but are entitled to health insurance, social security, minimum wage laws and workmen's compensation. There are organizations to protect such workers' rights, and a hotline to be called in case of distress.

Although the content of training programs for care-workers is outside the scope of this paper, it should be recognized that within the group called "the elderly," or "the aged," there are many variations. The young-old and the older groups have been somewhat facetiously termed the go-go group, the go-slow group, the slow-slow group, and the no-go group (Macarov, 1996). There are also ethnic and cultural differences (Ramos, 2007), financial levels, languages, and differential family structures. While the public image of the care-worker may be that of a woman, there are many male care-workers (Calasanti and King, 2007), and among the men and women there are gay and lesbian clients and workers (Brotman, *et al*, 2007). In short the individualization of clients becomes an important element in giving care and is – or should be – included in training programs.

Incidentally, the 1988 law was not accepted in certain circles in Israel. For example, the Arab sector did not take advantage of the law to any great extent because of objections to having outside caregivers in the home, but "the Arab community is no longer based on multigenerational extended families that include grandparents, all their married sons and their offspring," who traditionally took care of the elderly (Azaiza, 2001). The solution found was to allow the grandchildren (or other close relatives) to take care of their forbears (Azaiza, 2001) – which resembles the Dom Care mentioned above. Similarly, the ultra-Orthodox population in Israel cannot allow a stranger to live in the house, for fear of infraction of their stringent code of laws.

For a number of reasons, the first large groups of foreign care-workers to arrive in Israel were from the Philippines. Not only have relations between the Philippines and Israel always been close, but Filipinos (I use this to include Filipinas) speak English, which has practically become the second language of Israel. They also have a reputation as warm, gentle, caring people. In a very short time the term

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“Filipino” became a generic word for a care-worker. Since that time workers have come for a number of countries, but it is still commonplace to hear an Israeli speak of his or her mother or father being taken care of by a Filipino from Thailand, or Romania, or Moldavia.

So embedded have care-workers become in Israeli society that those from the Philippines have established an association and issue a newspaper, half in English and half in Tagalog -- once weekly and later monthly. They sponsor social and athletic events, study tours throughout the country and have held a beauty contest for foreign care-workers (including one for men), and children's talent shows. They have established six men's and three women's basketball teams, six women's volleyball teams, more than one football (soccer) team, and have an annual convocation. Their newspaper indicates where to turn for different kinds of help, including a hotline number for emergencies. In some cities in Israel every Sunday (which is a workday in Israel but an off-day for Christians) contains a virtual Easter Parade, as care-workers from Christian countries make their way to church wearing holiday clothes.

From the Israeli side, having a care-worker has become a fact of life for many individuals, and arrangements are made for them at various social functions. In many celebrations, such as weddings, guests indicate that they will come with their Filipino, and table-space is arranged accordingly. It is now common in theatres, for example, to see care-workers seated next to their clients, and they are frequently encountered in supermarkets, banks and post-offices, doing errands for their employers. In some countries it has been noted that there is a movement from full-time live-in workers with the same family to household services on an hourly basis (Tognetti Bordogna, 2003).

Although there are Assisted Living Facilities that provide services to the point that individual care-workers are not needed, there has begun a movement to allow the care-worker to live-in with the older or handicapped person even within such settings.

The live-in full-time care-worker program is not problem-free. On a national level, the demand for immigrant care-workers may be great enough to strain the budget. Canada, for one, has found it necessary to ration the service (Litwin and Lightman, 1996). On a personal level, different problems arise. One concerns the care-worker who is a parent, and leaves husband or wife and/or children behind, creating “social

orphans,” or “*de facto* abandonment” (Piperno, 2007). The abandoned person may also be a parent or grandparent. Solutions attempted include frequent trips home, many phone calls, and remittances. Another solution is for the immigrant to come for a relatively short time, and then return home for a similar short time, and then return to the same family as previously. This has been called “rotational migration” (Bettio, *et al*, 2006).

Another personal problem concerns marriages – within similar immigrant groups, across groups, or with members of the host communities. Since marriage in Israel is considered a religious rite, and there are no provisions for civil marriages, it is almost impossible for a person of one religion to marry someone of another religion. There are similar problems concerning children born to care-workers, particularly in cases of separation, divorce, or return to the native country by one of the parents. There is also the legal problem of the citizenship or immigration status of the child born of such marriages.

On the other hand, there have been very few published cases in Israel of care-worker abuse, or the care-worker abusing, exploiting or neglecting the client. There is little reason to believe that the import of foreign care-workers will diminish in Israel, given the continual increase in the number and proportion of the aged in the country.

With widening economic inequality in most of the world (Macarov, 2003), changing family structures, and increasing pressure for more individual choice, it appears that care for the elderly will become divided between those who can afford it, who will choose between residential and domiciliary arrangements; and those who depend upon government support, which will lead to increasing use of care-workers. There will, of course, be those who fall between the cracks and for various reasons must continue to depend up family, relatives, and humanitarian organizations for help.

At the moment, it seems that the increasing use of live-in care-workers is the most likely to grow, and perhaps grow widely, in the near future. The Israeli experience, in terms of selection, training, supervision and legal framework for foreign care-workers, as well as the partnership with non-profit and for-profit organizations, may offer some guidance in these directions.

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CHILDREN WITH MENTALLY ILL PARENTS – THE PROCESS OF SOCIAL EXCLUSION – A RESEARCH REPORT*

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Abstract:

Schizophrenia, obsessive compulsive disorder, paranoia - the diagnosis sounds like a sentence. This recognition weakens the hope that life schedules and dreams come true. Speaking simply: life with mental illness means “worse life”.

Despite that we have many arguments, that show nonsense of socially created symbolic wall between “healthy” and mentally ill people ancient myths and stereotypes, often deep-rooted in language, still have an effect on social perception of persons with mental illness.

Cultural pattern of interpretation causes that psychosis is a serious biographical disorder - disturbs not only the psychosomatic functioning but also other aspects of mentally ill people’ life. That persons have often to resign performing former social roles. Psychosis permanently or temporarily interrupts educational or occupational career and makes difficult being a good parent. In consequence, the quality of social life goes down: exclusion from everyday life and common affairs restricts talks and discourage to keep in touch in the future. Friends, and sometimes family members, become strangers.

Biographical experiences of children with mentally ill parents

Process of exclusion concerns not only mentally ill people but also their families. In my research work I described social and biographical consequences experienced by child of parent(s) with psychiatric diagnosis. Based on analysis of narrative interviews with the children I wanted to find (at theoretical level) the uniqueness of this phenomenon and (regarding practical conclusions) prevention actions reducing the discrediting stigma being given to that person (“child of madman”, “child of psycho”)

My research proved that persons with stigma “madman’s child” try to do their best to hide the true about their parent(s). For fear of social exclusion children work out own methods of “driving away” stigma. Closing in symbolic ring of fellows (persons who know about the illness), creating a specific, restrictive policy of identity - these are examples of strategies dealing with exclusion.

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The biographical intensity of the stigma (psychotic parents' child) depends on social images of mentally ill person. Practical actions ought to head to their transforming, for example through biographical film.

Demythologization of "madman"

Biographical film titled "Przetrwanie" ("Survival") created by Łukasz Dębski and me is the story of a man who is ill on paranoid schizophrenia. We accompanied him with video camera during daily life (in work, home, during shopping) in order to show the human like us. Proving similarities between our and his world we wanted to change the image of mentally ill person deforming through by existing stereotypes.

Keywords: exclusion, identity, discrediting stigma, children with mentally ill parents, prevention actions

Introduction

The history of mental illness, the old means of how its perceived and defined still plays a significant role on contemporary understanding and how mentally ill people are perceived. The stigma of the past influences society today and its views on the mentally ill and their families. Once perceived as lunatics they caused fear, d aversion and anxiety among people considered and considering themselves to be normal. Despite the fact that means of treatment, work methods and definition of the illness have all been altered, a "psycho" still remains a "psycho" in common awareness. By breaking the bondings of the sick we still maintain bondage on our perceptions.

Reasons for discriminating the mentally ill and their families needs, the stereotypes that have arisen cannot be explained without referring to the past. In this contribution I call forth just some of the factors that may have had an impact on how this phenomenon is perceived.

History

The first reference to cases resembling mental illness can be found in ancient scriptures. In very early myths and heroic stories, madness was a kind of punishment or destiny¹. The example given by Porter concerns Babylonians and inhabitants of Mesopotamia who attributed abnormal mood swings to the interference of supernatural forces for example possession by demons. The consequence of thinking this way was special treatment of mental illness, using prayer and spells. Quite often the

¹ Porter R. (2003), Szaleństwo (Madness a brief history) translation. J. Karłowski Rebis, Poznań.

motive of madness was connected with violence, cannibalism and blood-thirstiness. Homer, for example, describes Ajaks who killed sheep in mad faith, convinced they are enemy soldiers.

At its beginning, the Catholic church often perceived madness as a sign of holiness, thus something that could appear in a mystic's ecstatic vision. Mystics, prophets, ascetics and visionaries could be smitten this kind of "good madness"². The interpretation that madness is something coming from the devil, conspired with Satan, propagated by witches and heretics was much more popular however. As a result stakes were burnt and many women, accused of contacts with the devil, killed.

The end of middle ages gave rise to the formal segregation of the mentally ill and the healthy people (but we should remember the difference between medieval the definition of mental illness and the modern version) Ill people were confined to towers or case mates under public patronage. The Renaissance however, according to Micheal Foucault³ who should have been referred to much earlier, is when the event called "the big closing" took place. Lunatics and poor people all over Europe were to be isolated from the rest of society as the effect of extensive street combing. The poor, petty criminals, the idle, prostitutes, vagabonds, but most of all beggars filled the ranks of the mentally ill since illness functioned in these groups only in a symbolic way. As a paradox these asylums became the cradle of psychiatry.

A breakthrough of how ill people are perceived and treated took place approximately around the XVIII century, thanks to the reformatory ideals of people working in asylums, people such as Battie, Pinel, Tuke⁴. The prior, universally used "methods of treatment" (e.g. chaining people, bloodletting, cleansing) were replaced by more humanitarian ones. The possibility of returning patients back into the society was also considered.

Psychiatry gained professionalism at around half of the XIX century, when the headmasters of asylums started creating specialist organizations. This changed the medical view on mental illness.

² *Ibid.*

³ Foucault Michel (1987) *Historia szaleństwa w dobie klasycyzmu (Histoire de la folie à l'âge classique)* translation. H Kęszycka, PIW, Warszawa s. 53.

⁴ Porter R. (2003), *op. cit.*, s. 45.

Mental illness and normality

It is very hard to define mental illness without reference to mental health. These concepts are related to each other. Trying explain one means, sooner or later leads us to the other, since a simple explanation of what mental illness is, is the absence of mental health.

Health is most probably desired by all, and it seems impossible to imagine something healthy and bad at the same time. As a goal it is generally accepted and viewed as something normal. A lack of interest in health is behavior that can be perceived as disturbing thus associated with illness. Mental illness identifies everything that can be associated with things unpleasant, unloved and unacceptable. So, illness generates the postulate of bringing health back.

We can try to create a certain chain of dependencies. Starting with the concept of health. Health is something → desired, thus →accepted, and so forth → normal. However illness is something→ undesired → unacceptably → not normal. If we continue this line of thought a MENTALLY ILL PERSON is NOT NORMAL. I believe this is a point at which it is worth asking whether or not it is possible to be mentally ill and normal at the same time. Is it possible for someone to be both healthy and not normal at the same time?

Stigmatization

When I spoke to my friends about planning to work with the mentally ill, the general reaction was disbelief. Most people asked me whether I wasn't afraid, since they can be dangerous. They said hey could never work with such people because they are repulsive, smelly and neglected. Approval was scarce, however I did encounter t once n a while.

Being classified in this category of the mentally ill, one is deprived complete social acceptance. The negation of such a persons complete humanity may result in the belief that this persons children are from a lesser world. My research, the results of which I will present later in this paper, focuses of children of the mentally ill. I wanted to find out about the consequences of having a mentally ill parent, is the parents stigmata passed on to children. According to the people I studied the risk of being perceived through a parents illness is real ad that is why the illness is most often concealed from society in fear of being stigmatized, being thought to be ill as well. Stigmatization- creating a spoiled identity- is

based on projecting on to an individual or group opinions aiming at the reduction of their value, evoking aversion or bringing dishonor. This way, according to a simple mechanism aversion creates the averted. At the beginning, the dissimilarity marked by a stigma is seen as a manifestation of inferiority, in the end however the “victim” is held responsible for his “otherness”⁵.

Stigma, viewed this way, becomes the most visible attribute of the stigmatized person, pushing all others into the background-so the person is perceived through the prism of her/his defect.

In Goffman’s opinion, “the normals” (people without defects) stop believing that the discriminated person is a person just like they are. It is thus difficult to imagine when looking at a stigmatized person's child we don't think about her/him as the person wronged by fate, started off in life from a lower position.

Based on the model of stigmatization created by Rahmana Haghigata⁶. I will try and present the model of transferring sigma from the parent to the child.

The model I will present contains three components:

1. The cognitive component : when we learn that the parent of our child's playmate is a mentally ill person we begin to consider the certain consequences of this fact. Many believe that a mentally ill person is aggressive, unpredictable and a source of fear. Can playing with the child of such a person be thus safe? Can a mentally ill person's child also be mentally ill? The stereotypes that accompany mental illness can be discriminatory for both parties (the child and its parent). People do not always know or want to know the truth, use simplifications and easily accessible generalisations since these are far more easily, requiring no effort.

2. The emotional component (affective): the belief in the truth behind the stereotype causes an emotional reaction. This can be anxiety, fear, mercy and even anger directed both at the parent and child.

3. Discrimination: the behavioral consequences of the prejudice, for example hesitating to help, avoidance, social outcasting, all types of

⁵ Goffman E.: Stigma: Notes on the Management of Spoiled Identity [behind] Porter R. (2003), *op. cit.*

⁶ A unitary theory of stigmatization- pursuit of self interested and routes to destigmatization, Rahman Haghigat, British Journal of Psychiatry (2001) 178, s. 207-215.

force (i.e. The refusal to let one's child have a schizophrenic child as a playmate, not allowing the child to visit the home of another child whose parent is mentally ill)⁷.

Social consequences of medical diagnosis

Aleksander Kamiński, the prominent Polish social pedagogue, indicated three areas of human personality - biological, social and cultural. These areas compose the interactively permeated companion.

“Biological development requires a positive process - suitable care, compensation of possible dysfunctions of the organism, developmental stimulation by creating advantageous environmental conditions.”⁸

Social development- this is the following social inclusion into social groups, when the individual becomes a member. The assimilation of social roles also takes place in these groups. (e.g. daughter, pupil, worker). Favorable interpersonal conditions provide positive support in the process of development.

Cultural development- this is the adaptation of the values of the material and spiritual culture.

The areas mentioned above are necessary in order for the individual to function normally in the environment.⁹

Mental illness constitutes a danger for the normal functioning of social- cultural development (biological development is left intentionally by me because I don't have the competences and exceeds the issues that is of interest to me). The possibility of social- cultural disturbance concerns both mentally ill people and their children. I'll try to explain how this is possible . In the process I will separate the possibility of social- cultural disturbance into two categories. The first will refer to the mentally ill person and the type of disturbances that may occur and the second to the child.

⁷ A unitary theory of stigmatization- pursuit of self interested and routs to destigmatization, Rahman Haghghat, *British Journal of Psychiatry* (2001) 178: 207- 215.

⁸ Kamiński A. (1974) *Funkcje pedagogiki społecznej*, PWN, Warszawa s. 34.

⁹ Kamiński A. (1974), *op. cit.*, s. 34-37.

Disturbance of social-cultural development (the mentally ill)

Everyone, not excluding mentally ill people, has a perception of what it means to be mentally ill. The knowledge that mentally ill people are generally not accepted, that there is stigmatization and a tendency to their exclusion, makes mentally ill people acquire a passive attitude to life. This can also have a big impact on their reduction of self- evaluation.

The experience of being a mentally ill person is connected with the risk of losing of self- belief. The overwhelming feeling of being powerless becomes the reason of resigning from a previous life. The duties that lie on this person (as a e.g. worker, parent) are impossible to fulfill at the present moment. The ill person cannot live up to the expectations of others. A long- standing hospitalization in an obvious way leads to the exclusion of the individual from „ the normal life”. What’s more the fact of having been hospitalized is usually hidden from others. The patients are unwilling to share information of staying in a hospital with their colleagues and thus restrict their contact with the external world.

The psychiatric hospital is a total institution which means that it is a social organization which creates, for the people connected with it, a type of alternative world with its own rules separating itself from the rest of the society. The impact of such total institutions on the patient was studied, among others by J. Wing¹⁰ (1967). His research demonstrated that the number of patients who are indifferent towards external life is proportional to the length of staying at a hospital. This kind of institution, using its methods and through the specific socialization, can transform its members into people who lose their self-distinction, and identify more and more with this institution, the institution absorbs them.

We can say that the psychiatric hospital creates an alternative culture through the creation of its own laws and norms (a set of regulations, lists of dos and don't s) which are not obligatory anywhere else beyond this institution. It separates its members through e.g. uniform dresses, specific language which is understandable only for the residents of this institution. Consequently this can increase the patient's anxiety and difficulty in returning to “the normal life” .

¹⁰ Cite behind: Barbara Uramowska- Żyto, Społeczne determinanty zachowania człowieka [in] *Psychiatria* (1989) edited by Dąbrowski S. Jaroszyński J. Pużyński S, T. 3, PZWL, Warszawa.

The mental illness, as I wrote before, is connected with stigmatization. People with a psychiatric diagnosis aren't generally accepted in society, and are excluded from „a fully valuable” social life. In the mind of many people the perception of a mentally ill person is a human who is: aggressive, insane, sometimes funny because of things which he or she does or says. In jokes and theater scenes mentally ill people are portrayed as odd- looking, disheveled with straw in their hair. As a result people try to exclude the mentally ill from their group of friends. Various research has proved that social stigma leads to a reduction of life opportunity in people who are psychiatrically treated. First of all, the illness has a big influence on the reduction of economic status (it is connected with qualifying for social support rent or resigning from a job).

When I talked with ex- patients I learned they have problems with finding a job on the free-labour market after having been hospitalized on a psychiatric hospital. They say that disclosing their psychiatric episode reduces their chances of employment. Those who return to their earlier jobs feel that they are being observed by co- workers, are treated distrustfully as if the illness reduced their competence for doing their job. Not seldom, this kind of situation becomes the reason for looking for a new job “among fellow countrymen”, most often in a sheltered persons workshop.

The result of research¹¹ done in 1996 year in Lublin, in which 250 people living near a psychiatric hospital participated, showed that people wouldn't employ a mentally ill person in the following occupations: a doctor, nurse, teacher, social worker, priest (these are occupations that require immediate contact with another person). They wouldn't employ also such people in the occupation connected with the service sector (a cook, confectioner, bricklayer).

¹¹ Makara-Studzińska M, Jankowska J (2000) Stereotypy funkcjonowania psychospołecznego osoby chorej psychicznie, *Praca Socjalna* nr 4, s. 49.

Disturbance of social- cultural development (the children)

Social-cultural disturbance in development concerns interpersonal relations most of all. In the research conducted by Landau¹² the author observed that children of mentally ill parents have bigger problems in social relations with peers and a bigger tendency of using the aggression than children from “normal families”. One of the symptoms of mental illness is emotional autism manifested in the coldness of feelings and lack of need to make contact with others, not excluding family. The people who introduce children into the social world are parents. The situation of a lack of parents’ interest of having contact with the child can lead to, as Obuchowski, a Polish psychologist, wrote “to the deformation of personality, manifested in a variety types of complexes for example the inferiority complex, the complex of difference. Internal problems pose an obstacle in the normal process of satisfying the need of contact.”¹³

The social situation of children with mentally ill parents differs from the situation of a child in a family where this problem is non-existent. In many cases the natural roles are inverted and the child begins to play the role of the caretaker. “Such premature mothering deforms the child's normal emotional development (...) leading most often to a suppression of negative emotions, especially discouragement due to having to resign from the role of the child prematurely. The child – caretaker also lacks the life role model, someone who one can turn to for advice, an ideal for healthy parental behavior”¹⁴. These kinds of situations allow us to speak of a dissonance between the biological age and the life stage in relation to social age. The term “social age” was introduced to social pedagogy by Helena Radlińska a formidable Polish Social Pedagogue. Social age is a “means of determining the socialization of an individual in relation to his/her chronological, physiological, mental age, and intelligence, or the legal age allowing for a regulation of inter-generation relations and appropriate proportions between the physical, mental and social development of an individual”¹⁵: This means, that such a

¹² Cite behind Rodzice i dzieci. Psychologiczny obraz sytuacji problemowych (2000), edited by Milewska and Szymanowska A. CMPP, Warszawa.

¹³ Obuchowski K. (1967) Psychologia dążeń ludzkich, PWN, Warszawa, s. 216.

¹⁴ Kuipers L (1997) Praca z rodzinami chorych na Schizofrenię, Instytut Psychiatrii i Neurologii (Family work for schizophrenia: a practical guide) trans. Grzegółowska, Klarkowska H., Warszawa, s. 77.

¹⁵ Marynowicz-Hetka E. (2006) Pedagogika społeczna T. I, PWN, Warszawa, s. 543.

child at its biological development still remains a child (for example an 8, 9 year old) yet considering its responsibilities, day-to-day problems, outlook it has become a grown-up.

Children with mentally ill parents – the process of social exclusion-research report

Biographical experiences of children with mentally ill parents – the process of social exclusion

This paper has, so far, dealt with the problem of mental illness history, people who suffer from mental illness and the consequences that this diagnosis carries. In the later part of my paper I would like to focus on research that I have conducted in the years 2005-2006 on children with mentally ill parents. The aspect most interesting for me was the social experience of children whose parent(s) suffer from schizophrenia. In my opinion, the best method, allowing me to gather this kind of information was a narrative interview, that's why I used it. Owing to the spontaneous narratives of my narrators I was capable of reconstructing the biographical experiences of these people, and in turn, get to the essence of this phenomenon.

I conducted my research in a community club, which is created for children from the families with problems of schizophrenia. This institution operated (I am using the past tense because community club has suspended its activity starting 2006) at The Society of Friends of the Disabled (TPN). TPN is an organization which helps people suffering from schizophrenia return to social life. TPN also helps family members and one of the forms of help is to organize community services for children of members of TPN.

The analysis of material made it possible for me to reconstruct the process of building biographical strategies in the threatening situation of these children's social exclusion. The social exclusion of children from families with problems of schizophrenia does not happen in an automatic way. This process takes place in time and a variety of mechanism decides about its course.

Meeting with the other

At the beginning the parent's mental illness is not perceived by the child. Due to limited, independent contacts with external world a human doesn't have the possibility to compare his/her own life conditions, attitude and behavior of "significant others" with others. So the world, at

that moment, is the only possible world. The moment of confrontation with „Others” (e.g. going to school) is the impulse to rethink the uniqueness of one's own situation.. It appears that “others have otherwise” and this “otherwise” is represented by the majority. We can imagine a situation when we are on a journey to a foreign country, where everyone we meet speaks a foreign language. This new language at the beginning seems funny and unintelligible to us, but when we explore the land we realize that we speak in a funny way, not the way others do.

Adam: However problems as such began a little bit later, when I went to primary school (mmmm) (...) I lived with my mother in this/... earlier before, before this period, I lived generally with my mother, father, father appeared more or less often at home (...) But then I was simply as little enough to think that (tttt), (mmmm) it is (faster) normal

A. mhm

Adam: it was for me, nothing, nothing strange... so like I said... but later we moved

I missed it very, very... just mmm... I was jealous then of my friend-Michael (mmm) then... exactly... mmm I was jealous simply about his father (mmm) (4sek) as if... I don't know... I saw for example that he and his father play football or I don't know somewhere, somewhere, simply something, something they are doing together... in that moment, yes I missed that, that, where is my father why for example he doesn't play football with me , yes this was very hard period for me... but... not too bad to face it.

In realizing the difference between the worlds, it is time to adopt an attitude towards previous experiences. In the case of children with mentally ill parents this often is the decision to hide this fact from the outside. We speak of two means of reaching this decision.

1. The family forbids talking about family problems.

Adam.: In my family there always was this kind of conviction (yyy) always they instilled this type of attitude in me, that this is only internal family business, and nobody else has to know about this (2 sek) generally they treated it like a shy matter (yyy) shy matter about which we shouldn't talk, because the people, I don't know, will go witch hunting (...) I was afraid, afraid what would happen when this secret is revealed.

Piter: You know, others simply made the decision that it will be better, not to say anything, because people, simply don't know what kind of illness schizophrenia is and they don't tolerate people who are sick, because.. I don't know, it seems to them that the sick people for sure have a knife and they push it into... or something like that, equally sympathetic (yyyy) and that's why (yyy) I didn't say anybody about the illness

2. Hiding the truth as an effect of negative experience with disclosure

Agnes: At school, I remember, that they started looking at me a different way, you know, this kind of mercy on the teacher side, this was horrible. Because you know „at the beginning I didn't resist speaking in what kind of hospital my mother is (psychiatric hospital). But when Not before people react I stopped talking about this. Because, you know, everyone started to ask...you know... in a sick way “ Is your mother among psychos - they asked me, or behind your back, they said something.

The feeling of loneliness experienced by my narrators, in a sense of “being the child without a parent” (during the period of hospitalization), was perceived as something natural but the return to these events was interpreted as a hard situation. When I thought about the reason for the different interpretation I started to take into consideration the possibility of perceiving the past by the prism of “the opinion of the majority” of what a happy childhood is. So we can say that the childhood was happy until others appeared.

Jacob: That's true that the fact of having an ill person in the family influences one's whole life. It means, for example, in my experience it is like this, that my mother was absent one and a half year when I was little , when I was from 4 to 6 years old annnd my father too, also kind of didn't (snort) didn't take care of me (...) I think that this kind of heritage, that, because, of this one learns how to be alone, being alone is perceived as something natural for you it is.

Agnes: and then they were the first symptoms, but I was too little and I didn't understand what happened, well she went to the hospital so she went , I didn't see yet, what was going on , and then it was somehow normal, and it passed away without the big tragedy

Anne-” My mother was often ill, generally from the beginning I remember how she went to the hospital and came back and over and over again, now it is, the same (2 sek.) such a hard illness but I don't know, whether I experienced this?

The circle of the fellows

The secret requires the definition of people to whom it will not be revealed. It is necessary to outline the border between those who know about the illness and people who don't know. My narrators start to take action in order to keep the secret, and not to tell anything to people “who don't know”. I call this, after Erving Goffman - leading a restrictive policy of identity. This is a manipulation in order to hide the true reason, for example: for the misbehavior of a parent or his long absence.

Piter: I didn't talk to anybody about the illness, when my mother went to the hospital, I said that she went to the sanatorium because she had a problem with her heart.

Adam: and it looked like this during some period, until my high school too, too ... I was ashamed a little, I was afraid, afraid of this that the truth will

come in... especially that there were two times this situation when my father was in the time of the intensification of the illness (yyyy) annd exactly, let's say they were maybe two times when my colleagues saw him in this state, when he went somewhere, so he was in this.... in this phase, like.... I don't know... like features (quietly) (mmm) so that, the state like that, that he said nothing, he didn't speak and I had to communicate with him with the sign language. So I had to invent different cosmic excuses that, that, why it happened like this.

Ewa: I can't say how somebody will react so I prefer not to speak, to play it safe. When everybody knows that my mother has heart disease, everybody took note and everybody asks how she feels, they simulate the worry and this is enough. Generally I tolerate the mentally ill people, I don't thrust away, I can talk with everybody in this place, I understand that this is the illness but not everybody, most people scare that, I don't know, maybe that the mentally ill person will kill them or do something else (smile) I don't laugh at this

Trying to explain this mechanism of starting to behave like this I'll refer to Goffman too, who wrote about the phenomenon of "spreading" of the stigma on the family. The narrators behaved like people who are "discredited" that they are the people who don't have an apparent stigma, yet because of the fact of having an ill parent, and in a result of magical thinking, they experience the indirect stigma. They hide the information for fear of being labeled a "psycho's child".

The truth about the illness wasn't kept secret in every case. One of my narrators talks about a parent's illness in the following way :

Eveline: so then, that day we met a lot of people and we were sitting in the Pomorska Street, I was sitting and saw my father going, in the normal way I'm thinking, oh God, please only not this because I thought that he was still ill or something like that but it was good, there I came up to him and I... we started something, together talking annd he said to me that he will come back soon, annd he didn't, I say O.K. Super. We were waiting here all the day for him and, but, but nothing happened but it was good but I don't know/ for me it is nothing terrible that I have the mentally ill father and I don't know that this kind of thing... because It is normal I think so, that every human is ill?

M: mhm

E: For me it is normal and I don't have bigger problems with that, I'm ashamed that my father is ill because this isn't/ there is nothing to be ashamed of, this is just the illness

The family members very often experience a sense of stigmatization and isolation, and thus avoid contact with others, and talking about the illness. Once one problem becomes a secret automatically every other problem becomes a secret, you just don't talk

about difficult matters with others. They start to develop the belief that talking about themselves with teachers, colleagues is not allowed.

The consequences of this way of thinking are reflected in interpersonal relationships. The barrier in communicating with others led to the beginning of the problems in contacts with other people. My narrators said that the fear of revealing the secret didn't facilitate tighter relations with other people.

Piter: I have to say that I started to worry that what will happen when people find out. That's why I didn't feel comfortable till the end amongst them, I couldn't talk about my problems, still I don't like to do this.

Anna: When it comes to friends, I didn't told them too.... I was always afraid of that.... I speak a little about me, rather I was reserved, because I couldn't talk with others about my problems. When I met Krzysiek for a long time, I had the problem to open myself, I couldn't trust and so on... But when I was drunk (smile) in that moment I was always talkative and I could talk about my feelings (2sek) but later... silence... (...) I think that a long time passed, six,, seven months before I talked about my mother, that she is ill and so on.

“The air valve”

In the opinion of my narrators the situation made it difficult to get close and form a relationship with others. But it didn't mean that they didn't feel the need. The turning point came between the age of 15 and 18 . That is the time when a human becomes more and more of an autonomic individual and demands his/her own rights. It is difficult to say that in this period something extraordinary happened to these people in comparison with children who have healthy parents. The tendency to separate oneself from the influence of parents, preferring the accompany of peers to adults, this is typical behavior of young people in this period.

Piter: After I went to high school, and this problem, at least for me went to the background, you know, friends, parties, these were my priorities. I belonged to the subculture so called Depeche (...) and there, in the group I felt good.

An interesting fact is, that in this period, very often, when the process of revealing the secret of being the child of a mentally ill parents takes place.

Adam: However in the high school (mmm) I found the group of suitable people and just like that at once we started to talk to each other and just like that, I don't know somehow, somehow I opened and I have to say that it was, it was some kind of vent of some kind of accumulated emotions some... the experience, and in this moment I felt better, I felt more better and as I expected the reaction of my friends was really positive, I would say the reaction was indifferent. (laugh)

Why this is the period, between 15 and 18 years of age, the time when people overcome their shame? Perhaps it is connected with the youth rebellion?

Maybe revealing the secret is one of the ways to manifest one's independence and to rebel against one's parent's wishes.

This is not, of course, a complete picture of the situation of the child raised in a family with problems of mental illness. My aim was to present the process of exclusion and strategies of action in the situation of a social exclusion threat.

The actions taken up by my narrators had the character of camouflage, but in my opinion professional action should take an informatory course (documentary films are an example of this kind of action). Mental illness should stop being a difficult issue and taken up only in the situation when one is faced by it. Insufficient information poses the risk of using existing stereotypes in the perception of mentally ill people. Broadly understood education about the specifics of mental illness give us the chance to look at ill people in a different context. It is important that people who are ill talk about their experiences, because nobody but they themselves know what it means to be mentally ill. The presentation of real experience connected with illness makes confrontation of myths and reality possible. The transformation of the image of the so-called "psycho" will also be, indirectly, beneficial for family members. Making this matter a public one will have an impact on the quantity of reflection on this issue. Therefore this conversation will be easier because both interlocutors will have a broader knowledge.

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"BEGGING" BY THE CHILDREN OF ROMANIAN ALIENS IN POLAND AS AN EXCLUSION FROM BIOGRAPHICAL CHILDHOOD TRAJECTORY

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Abstract:

According to U. Beck, we perceive the mechanisms of the modern world as characterised by intensified spatial expansion of individual, group-related, institutional or social risk. While this risk is democratically distributed, it is but a few that have at their disposal the means, methods and skills to minimise the risk. As a result, those with the ability to defend against potential and realistic threats of the modern world, and those inhabiting the space of poverty and marginalisation, with a limited interpretative perspective for the challenges of the present day, understanding thereof and acquiring competence in control thereof, are accommodated poles apart. The "wasted people", to paraphrase Z. Bauman, are increasingly conspicuous among us, with no chance for decent lives, pushed to the margins of social life, they gravitate towards the borders of law, living time and space. They are subject to social transposition and biographical exclusion, aimed at survival and continuing their lives. In Poland, this group comprises illegal aliens from Romania. They deal in "import begging", whose essence is the exploitation of their own children for begging purposes or as "begging accessories". Pushing children into begging by their parents results in exclusion from their biographical childhood trajectory, rendering it impossible for them to mature with a sense of social, emotional or ethnic security. These parents expose their own children to forming "pseudo-adult" attitudes, growing up in a culture of poverty, acquiring beggar strategies and staying alive solely thanks to alms. While discussing the issue of begging from the perspective of a child-participant in the trade, the focus will be on the very child's experience and the influence of begging on his/her biographical childhood trajectory. Hence, the theoretical and empirical basis for the present article has been constituted by the assumption that begging among children of Romanian aliens in Poland determines the following in the children: inadequacy (due to developmental age) in satisfying existential needs; alienation from the world of childhood, as well as peer or ethnic groups; living the "adult" problems; appropriation of their time and space reserved for a carefree and cheerful childhood through being used for begging purposes by their parents.

Children doomed to social marginalisation are suspended in their development, fail to define themselves and their place, as well as being exposed to the experience of "growing up fast". They create an existential image of developmental inadequacy and an

unfair gap emerging in the incomprehensible and difficult reality of the adult world. They are forced to inhabit that world because – due to their age and dependability on their parents – they are unable to escape or otherwise leave it behind.

Keywords: child's, beggarly, childhood, aliens child

Introduction

By referring to U Beck's conception (2004), we acquire an orientation by perceiving the mechanisms of today's world, and this world is marked by an intensified expansion of the space of an individual, group, institutional or social risk. Although that risk is distributed democratically, only few have at their disposal means, ways and abilities to bring the risk to the lowest level possible. And consequently, those who are able to repel potential and real perils of today's world and those who live marginalized in poor areas with a limited interpretative perspective of current challenges, of their understanding and of becoming competent so as to subdue this are actually poles apart. By paraphrasing Z Bauman (2004), 'junk people' are becoming more and more noticeable among us, have no chance of living with dignity, are shifted to the margin of society and go on existing on the fringes of the law, place, time and space of life. They are subject to a social transposition and biographical exclusion aimed at surviving and remaining alive. This group includes as well illegal refugees from Romania who, in Poland, practice 'import begging' that consists in using their own children either to beg or as 'beggar's requisites'. The involvement of children into begging, as practiced by their parents, causes an exclusion of their biographical trajectory, which prevents them from growing up in social emotional or ethnical safety. Such parents expose their children to the danger of being shaped by means of 'pseudo-adult' attitudes, growing in the culture of poverty, learning the begging strategies and living only on handouts.

While taking up the issues of begging from the viewpoint of a child who participates in this practice, attention was focused on the question of experiences gained by the child proper and on the effect exerted by begging on their biographical trajectory. Hence, for the theoretical and empirical base of the considerations there was made an assumption that among Romanian children in Poland begging determines in them the following features:

'Begging' Among Children of Romanian Refugees in Poland...

- Inadequacy (because of the developmental age) in satisfying their existential needs
- Alienation from the world of childhood, peer and/or ethnical group
- Living with 'adult' problems
- Appropriation of their time and space reserved for experiencing a carefree and joyful childhood – as their parents use them for begging; disturbance in the socialization process
- Experience of a chronic developmental, traumatic, psychological and existential crisis
- Sense of 'otherness'

A child condemned to social marginalization remains in a state of suspended development, is unable to define both themselves and their place; for being subject to 'fast adolescence', a child makes an existential picture of development inadequacy, unfair change towards the reality of adults' world in which they are compelled to remain as they can neither escape nor break away because of their age and dependence on their parents.

Begging as a privatized oppression of existence of social exclusion

Despite developmental processes, an improvement of the living conditions and progressive democracy, a new structuring and restructification of societies enlarge the social areas of exclusion and marginalization. Therefore, the excluded are also those whose living conditions and life style are diametrically different from the accepted life standards, who occupy most marginal positions in a social system, and who are excluded from the fundamental spheres of life, rights and resources. Beggars, whose position determines their social status, an inherited acceptance of the existence that requires extreme limitations, generational adaptation of extreme situations in which is exposed and remains uncontested the incertitude and impermanence of human existence, are those who occupy nowadays the most marginal positions within the social hierarchy.

As of today, the begging practice constitutes a multidimensional issue which is also complex due to its determinants, socio-demographic, spatial, time aspects as well as its cyclical character of deprivation meaning an inter-generational transmission of the same. The complexity

of the phenomenon of begging is exposed in the conception of social deprivation referred to as *human poverty approach* rooted in the philosophical idea of A. Sen (1999, 2000). According to this philosophy, beggars are those who have an impaired ability of achieving market entitlements. Such an entitlement means a set of alternative market-related choices a person may attain by means of legal ways available to someone endowed with that person's status. (Dahrendorf, 1993). Such entitlements may be based upon a particular accumulation of features- 'assets' or actions - 'exchanges'. Those are entitlements arising out of the ownership, trade, production, one's own work and market exchange. Each person and family has their own package of entitlements; therefore, as A Sen 1999 has it, begging is rooted in the distribution of entitlements. In this philosophy, begging is a consequence of the monopoly on power; hence, social barriers, not a lack of goods, are the decisive factor for the essence of begging. The phenomenon of begging becomes an inherent part of the paradigm of social exclusion referred to as a monopoly paradigm (Silver (1994). In consequence, this phenomenon is a function and derivative of social order which consolidates social inequalities by the monopolization of advantages which result from always insufficient resources as performed by insiders. That is why beggars, for being excluded, are not only outsiders but are also subject to domination.

The determinants of begging are also an inherent part of the individualistic and structural orientation. The structural orientation lays emphasis on explaining the phenomenon of begging, on the factors and mechanisms which are beyond direct influence and control of a person; hence, the sources of begging do not belong to the sphere of properties and attributes of the individual himself, but they belong to the sphere of properties and attributes of the social structure and infrastructure - begging, its range and character constitute in this orientation the consequence of the existing organization of the society. In that orientation, the dominating classes strata and groups which rule according to their interests do consolidate such a distribution of goods and services in such a way that the distribution of the latter is unequal. Beggars, whose cultural assets are usually different and who have actually no social, cognitive and economic resources, are doomed immediately to failed life and lack of success since they do not hold any positions in the social hierarchy as determined by the access and volume of life opportunities.

Instead, a common quality of currents within the individualistic orientation is the identification of fundamental inadequacies or incompetence responsible for the life situation of beggars. According to the individualistic orientation, people may become beggars due to a limited degree of their own skills, qualifications, bad health condition, mental diseases or impairment, physical disability, inclination towards addictions or helplessness. Therefore, beggars means people incompetent in life due to inadequate personality; and such an adequacy may be related to culture, society or psychology. People become beggars:

- In consequence of biological inadequacy - because their own genetic limitations prevent them from functioning in life and satisfying their needs by themselves;
- In consequence of market inadequacy - as they do not have proper qualifications and skills to enter the labor market, are resistant to work, or have no clear-cut professional aspirations, are not active job seekers. They accept the state of being abandoned, are 'work-shy';
- In consequence of psychological inadequacy – because as early as in their childhood they experienced from their parents the deprivation of the need of safety, acceptance, understanding, agreement. While being children, they were growing up in families burdened with many problems where many negative factors were accumulated, and those factors limited the children's cognitive, emotional and social development;
- In consequence of cultural inadequacy – as they were growing up in the culture of poverty and developed a specific *universum* of standards, patterns, values, beliefs and manners, aimed mainly towards the presence, inability to plan, shifting gratifications into future and an enslaving character targeted at surviving, not at developing.

The properties of begging culture are handed down from generation to generation in the process of socialization. Of course, this kind of heredity of begging mentality is accompanied by immaturity and helplessness, unstable life style, low mental and cognitive fitness, and other factors.

That is why the phenomenon of begging is an inherent part of a cycle of deprivation:

- the parents who experience deprivation transmit to their children - in the process of socialization - the resources, patterns and values which once caused the former to live by begging
- children experience social, emotional, intellectual and economic deprivation
- children are either excluded from school or exposed to school failure
- when they become adults, children have a poor education or are way behind in elementary education, have no professional qualifications and therefore their knowledge is too little to break away from the environment in which they were growing up
- Like adults, they keep an irregular life style, live in existential risk and extreme situations.

In order to explain the phenomenon of begging from the viewpoint of active participation of a child in that practice, the conception of social exclusion as a feature of the child's life situation, and biographical trajectory seems to be the most convenient; in this case, the experience of exclusion means falling into oppression, dependence on parents who have lost any standards of living, permanent limitation of the child's skills of functioning in the society according to their developmental stage, which eventually leads to the exclusion of their biographical trajectory of childhood.

Begging of a child as a biographical trajectory of childhood

Childhood is a particular period in the biographical trajectory of the man. A child is marked by defenseless, imperfection, dependence, immaturity, so they must rely on their parents so as to satisfy their needs. A child also needs parents to fulfill their own desires, to learn fundamental activities, behavioral patterns or attitudes.

A child is a bio-psycho-social being; therefore, the following is indispensable to guarantee their successful development:

- in the biological aspect – an appropriate care of their body, supply of food, proper clothing, shelter, medical and dental

- care, stimuli to give vent to their unlimited energy, being given equal opportunities, stimulation of their development by securing favorable living conditions;
- in the psychological aspect – proper satisfaction of the need of love, safety and emotional balance, acceptance, understanding, agreement, drawing attention to themselves, knowledge of themselves and others, exercising of cognitive skills in their own activities, gaining information on themselves to build their own identity;
 - In the social aspect – proper contacts with other people, learning the rules of social existence, settling into social groups to become their member and to hold appropriate roles in them, following the school syllabus, gaining systematic knowledge aimed at learning a profession and getting a job.

The time of childhood is a time when a child needs the sense of existential, and emotional security, stability, closeness, stimulation and challenges, affirmation and settling in. A child's needs are insatiable in that period, viz. they continually need their parents through all the childhood so that the latter may take care of them, be involved, pay attention to them, help them solve the encountered difficulties and problems.

If a child's biographical trajectory is built on the experience of deprivation of their parents, which, among others, is expressed in the following: (Spicker, 1993):

- A profound deficiency of physical comfort: a shelter that cannot protect enough from calamities, badly illuminated, overpopulated, dirty, famine, living in slums where this word itself means not only poverty, but also a certain life style
- poor health conditions: high probability of short life span, frequent and chronic diseases, physical or mental impairment, disturbances of personality
- serious deficiency of social security: lack of employment, profession, means, permanent exclusion from professional activity, social welfare system, professional aspirations, family instability, nomadic life style;
- serious want of esteem: unfavorable image of oneself, helplessness in life, sense of injustice, disbelief in their own

strengths, life reduced to survive, then, this child will experience exclusion of childhood.

Here, the exclusion of childhood means a multidimensional process in which a child is permanently subject to experiencing a threat, uncertainty and oppression, which, in turn, cause in them:

- loss of happiness of life;
- loss of being carefree;
- sense of being 'different'
- sense of intellectual, material and existential inadequacy;
- No possibility of school education;
- Loss of contacts with peers;
- Sense of shame and guilt;
- Use of strategy – 'avoiding non-existence through avoiding being'.

In particular, exclusion of childhood is impending in the case of children of illegal refugees who use their own children as 'begging requisites' or to get handouts. For being involved in the practice of begging by their parents, those children are excluded from having an opportunity to have a correct cognitive, emotional and social development. From their early years they become used to assuming the responsibility for the family, they demonstrate pseudo-adult attitudes, excessive docility and subordination to their parents, accompanied by the sense of alienation and estrangement. They are exposed to experiencing their otherness for having ended up in an alien, unknown environment, to a language barrier, being ashamed of their dissimilar look, pressure from their parents who make them stay for a long time at public places with a slip or a sheet of paper to gain some money to live. Their world of the biographical trajectory of childhood has been appropriated by adults and problems which are beyond their developmental potential. When the parents shift their own problems, emotional immaturity, mental disturbances, incompetence, helplessness to their child, they will create an internal 'self' rooted in the shame and sense of guilty. Any child detached from their development-conditioned childhood must be unhappy, since they are in want of some skills, indispensable for effective overcoming of difficult situations, viz. the ability of communication, understanding and forecasting; failure to master the fundamental

adaptation techniques, body weakness and immaturity of the nervous system expose a child to a continuous experience of the tragedy of being helpless and to the consolidation of deep-rooted traumas. (Chłopkiewicz, 1980).

A child depends entirely on their family. When rooted in their family, their individual needs related to the development can be satisfied. The child can rely on a stable perspective of time, place, objects, methods and care. This stability is the prerequisite for learning oneself and others, principles, standards and values. When a child is exposed to growing up in the existential chaos, lack of existential, material, emotional and cognitive stabilization, when their place of residence is frequently changed, their mental equilibrium becomes disturbed and they end up in a state of permanent uncertainty, they are in want of the sense of settling and of being at 'their own place'. When the outside world opposes a child, when adults appropriate their world entirely, the child's needs recede into the background and are as such often unknown to them, the child has a poor chance of personal development. In case a child is used by their parents to beg, the immature, distorted needs of a parent/ parents generate incorrect expectations related to the child which depart from their role and developmental stage. The child develops negative complementarity as a reaction to fear and tendency towards the satisfaction of immature needs of their parents (Geller, 1973), which consists in the child's adaptation to the distorted expectations of the parents. Therefore, the natural order becomes inverted viz., the child has to look after their parents, which develops in them an existential drama of childhood burdened with a legacy of immature adulthood of adults.

Begging among children of Romanian refugees in the light of the author's studies

„Import begging”, or else foreigners coming to Poland to practice begging, is marked by having no residence permit authorizing them to stay legally in Poland. Especially dramatic is the case of children of illegal emigrants who are compelled by their parents to participate actively in begging irrespective of their developmental age, health condition or mental and physical state. Hence, the investigation performed among children of Romanian refugees who practiced begging, aimed at collecting some information from a child on the experience related to their begging – viz. what importance they attach to begging

from their own perspective, what their relation to their own parents is like, what experience accompanies them while staying in an alien country, what they dream of and what they fear most. In order to gain insight into the world of a child who obtains money from begging, the biographical method was applied. According to Helling (1997:384), this method allows one to present and define a person, a group or organization in such a way like such a person, group or organization interprets this experience. The main target of this research was the subjective interpretation of the biographical trajectory of a child who participates in begging, the importance they attach to themselves, their parents and their situation – as seen from their own perspective. A child under investigation recounted how they lived under a research program, and due to the application of projection techniques, like the technique of incomplete sentences, test of drawing and narrative interview. This research comprised children of Romanian refugees aged 9-12 who practice begging on Warsaw streets.

Case of Danut

Danut, aged 11, comes from Suczava, is very taciturn and mistrustful. He speaks about his life with reluctance. In Poland he is staying with his mother and junior sister. Usually, he stands with a piece of paper reading 'I'm hungry' in the passages of the Central Station and collects money from passers-by into a tin placed on the ground. He does not like it, but he does know this is the way he can get some money for his mother and sister. When he brings some money, his mum and sister can eat their fill. He does not want to tell where he lives in Warsaw; when asked about his father, he lowers his head. He is most worried that his mother should not be taken ill, about their being on the safe side, is afraid of being abandoned and what may happen if they have no more money. He feels out of place in Poland, has no pals, does not understand the language, does not talk much with his mum who likes being silent, and speaks a few words to him and his sister, only. He dreams of their own home, his mother having a job and that he and his sister will no longer be hungry. He does not attend school as he must look after his mum and sister. On Sunday he goes begging at a church – when people leave the church after a Mass, they drop something into his tin. A lady gave him once a bar of chocolate. To collect money for food, almost every day he begs from the morning to the evening, 'as long as possible'. When he is standing for hours with a sheet of paper reading he is hungry, he never

accosts people in the street, and keeps on standing in silence 'with his head lowered'. He is ashamed of people, and fears especially of the municipal police who a few times chased him out from the place where he was collecting handouts. Basing upon the drawing made by the boy, and entitled 'my family', it can be concluded he experiences the frustration of the need of being dependent on his mother; the figure of his father was left out, which may suggest he is of lesser importance in the boy's life. An analysis of the symbols in the picture showed the boy obviously belittles himself, his face is sad - that is why he can be tormented by the feeling of being of little value, fear caused by the lack of emotional and existential safety. The test of incomplete sentences can corroborate the boy's experience related to traumatic adventures in his life. An investigation into the text, targeted at the emotional and semantic charge, proved the boy was very taciturn and coy about revealing his experiences, has a strong feeling of shame and his otherness, has got strong emotional ties with his mother, does not believe in any change in his situation, is tormented by the loss of happiness of life, and therefore:

- He is ashamed he 'is poor, has no place to live, no clothes of his own'
- He wants his mother to 'smile'
- He dreams of 'his own house and room'
- He trusts 'nobody'
- He believes that in future: 'in nothing he believes'

Case of Nicolae

Nicolae is 9 and comes from Oradea. He is staying Poland with his mother and father. It is conspicuous that he avoids any eye-to-eye contact, is tense, blinks his eyes nervously. He is of asthenic structure, with poorly developed muscles and too low a weight of the body. According to his inaccurate enunciations, he lives somewhere in Warsaw with his parents beyond a bridge (probably in the allotments). Initially, he dealt with begging accompanied by his mother. Every day they used to leave their place of dwelling, reached the downtown and places with heavy pedestrian traffic. Mother used to spread a piece of paper on the pavement and made him sit down nearby. Afterwards, she put a cardboard sheet in front of them, but he did not know the wording because it was not in his native language. But for a certain time, his mother has had a bellyache, been vomiting a lot, and now she cannot eat

anything; when his father stays with the mother, he runs up to cars lining up at an intersection and asks for some handout. All money he collects during a day, sometimes good money, is handed over to his father. The father buys food and medicine for the mother. He has no longer any fear, feels nothing, and collects money, cares about nothing. He only worries about his sick mother. He dreams of his own speedy car, a large house with a big TV set and sweets. He does not go to school, dislikes learning, has no friends in Poland and does not need them at all. He refuses to say what he does by day when he comes back home; neither does he want to confess what he feels for his parents. An analysis of 'my family' drawing indicates he distances himself from the father; whereas, the mother is presented as a withdrawn person. The figure of the boy proper in this drawing, obviously with his back turned to his parents, may imply he is experiencing the feeling of ambivalence towards them and is suppressing negative emotions towards them. The concealed emotions towards his parents and the importance attached to his situation can be confirmed by the investigation into the test of incomplete sentences which corroborates that he feels being emotionally rejected by his parents, neglected because of his mother's disease and intensifying family problems, and he feels alone in his situation, so eventually:

- He is ashamed since he does not have 'what other children do',
- He wants that his mother 'be not indifferent to him and notice he does exist, though',
- He dreams that 'his parents may once have money and buy him a computer and a plenty of food',
- does not trust: 'people because they are bad',
- He believes that in future: 'he will be rich and travel where he wants to'...

Case of Ella

Ella is 8 and comes from Curtea de Agres. Her mother deals with the practice of begging in which Ella acts as a 'begging requisite'. Due to her look –as she is very tiny, short, her face is emaciated and eyes are sad – she draws attention of passers-by who feel sorry for her and are more willing to drop some handouts into the box. Ella does not leave her mother at all, seems to be intimidated, or actually paralyzed with fear and to have strong emotional ties with her mother. It is very hard to come into contact with her; she is as if she were a 'child in the fog', viz. absent,

does not react to the investigator's questions. Her retarded psychomotor development is obvious. She produces reactions incommensurable with the stimuli; predominant are emotional reactions, typical of children at an earlier developmental stage.

In Ella's case, the 'separation fear' has become evident. The main feature of separation fear is that a child is unable to stay at a distance from their parents. If they walk away from each other, they think they will never join their family, something terrible has happened to them, they have been abandoned (Barker, 1984). That is why the investigation could be performed only when the girl saw her mother in the corridor, was able to look at the window of the room where the interview was being held so as to be assured her mother was nearby. As far as Ella is concerned, the investigation was limited only to a 'my family' drawing she made. The analysis carried out on the drawing proves her strong emotional ties with the mother; instead, the father is left out in the drawing, which might suggest that either he is absent from the child's life or has been emotionally rejected. In addition, a very poor symbolism of the drawing, lack of surrounding elements may imply either a disturbance in the field of creative expression or minimization of the stimuli in the environment the child lives in.

Conclusion

The analysis on the cases of children of Romanian refugees who practice begging can indicate the following:

1. children who deal with begging are marked by the 'stigma of exclusion of childhood',
2. it is obvious their parents burden them with adults' problems,
3. exclusion of childhood, because of family hardship and a large number of problems accumulated in it, contributes to various levels of disturbance in their developmental biographical trajectory,
4. exclusion of childhood prevents children from the correct physical, emotional, special and cultural development
5. exclusion of childhood of children who practice begging dooms them to a permanent limitation of abilities to biological functioning and their development is reduced to survive

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DIVIDED CITIES, INVISIBLE YOUTH AND "WRITING COPING MAPS" – TOWARDS A SOCIAL GEOGRAPHY OF ADOLESCENCE

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Abstract:

The theoretical approach of "writing coping-maps" from the area of "Social Geography of adolescence" is based upon the hypothesis that present geographical approaches are losing sight of children's and young people's socio-spatial problems in divided cities. To face today's problems of growing up in cities - e.g. the "new poverty", increasing delinquency and youth crime or increased problems of integrating certain sections of the population - we have to uncover the invisible forms of coping with being useless (see e.g. "The End of Work", Riffkin 1995), to explain the reasons which are behind them and to do something against it.

"Invisible coping-maps" is developed on the basis that children and young people, growing up under the circumstances of digital capitalism, try to solve their problems of being useless with increasing frequency outside the institutions of socialization like family, school or the traditional social system. We assume that every human being (idea of "Making Geography" (Werlen 1995, 1997, Werlen/Reutlinger 2005)) writes its social (coping) map in order to keep his/her capacity of acting in spite of a rising number of so-called 'useless people'. In the empirical part of the present paper we have carried out a comparative study of the above subject in three Spanish cities (Madrid, Barcelona and La Coruña). This study is part of a higher research project combining the cities of Madrid (Spain), Perpignan (France) and Palermo (Italy). It serves the "Invisible Youth Integration" - project of the European Union's initiative "Leonardo da Vinci".

Keywords: social geography, children and youth, urban geography

Flashlight – labor situation

“- You don’t get a job in this quarter. To find a job you have to go outside the city, as there is no work here. There we can work, but for how long? ... Not for long.

- You have to be excellently prepared, trained...

- However, this young woman, who has all the necessary training, is out of work too.

- Well, by December I will have found something.

- But for how long?

- For some time, and then the whole things starts again... that’s the way it is. At least I will have a job.

- Yes, you will, like all the others, for a month, a year, and then....

- Unemployment is a major problem, not only here, or in Paris...., but everywhere.

- Employment is not the concern of the youngest and we don’t want a place like school, but if you have to try so hard to get a job and if there is no job here and if you have to leave , ... this is what we are concerned about“ (group of ten youths aged between 12 and 22 interviewed in Madrid, Spain).

The urban image is constantly changing. The increasing global economic integration also has an effect on the cities. Most people of the world work and/or live in cities. As a result, also for children and youths the city gains very much importance as a place where they grow up. In this lecture, I would like to depict the city as a place for living and the constant changes of the supposed chances and constraints for children and adolescents, which are affected by the urban development. To understand the spatial and social problems children and youths are faced with, it is necessary to take into account the relevant idea behind the term ‘city’ when different notions of it are being discussed.

In my paper I would like to give you an overview of the *Everyday Regionalization* approach which is lively being discussed by German-speaking social geographers; it is called the *Werlen* debate after Benno Werlen – a Swiss social geographer who initiated this discussion. My paper will focus on the contribution social geography researchers can make to the identification and solution of social and spatial problems which occur in urban spaces. It will primarily be about the problems of children.

The flashlight you have just read is based upon young people living in an underprivileged part of a Spanish city. They speak of the steadily growing pressure that they are forced to bear to keep up with the others. It is hard to find a job. If you find one, it is just for some time. Then you are going on job hunt again. The second part of this lecture is supposed to reveal the social changes that are behind the statements of these young people. The explanation of the actual spatial and social problems of children and youths in European cities calls for new approaches. The 'invisible coping maps' are instructive in illustrating one of these new approaches. All the theoretical considerations have been made from the viewpoint of an empirical research project carried out in three Spanish cities (Madrid, Barcelona and La Coruña). This investigation in its turn is part of an European research project of the EC initiative *Leonardo da Vinci* under the headline Invisible Youth Integration. It compares Madrid (Spain) with Perpignan (France) and Palermo (Italy).

1. The late modern city and the socio-geographic approach of the 'Everyday Regionalization'

The starting point is the idea to call the social conditions of the nineties *Late Modernity*, *Second Modernity* or *Reflexive Modernity* after the English social theorist Anthony Giddens instead of describing it as the post modern age or the risk society. Late modern cities thus denote contemporary European cities in which the results of the industrial capitalism or the First Modernity became radical and universal. Under the influence of Late Modernity, growing up in an urban habitat is characterized by a spatial and temporal disembedding process. Socialization during childhood and adolescence does no longer take place within a normal biography which is generally given, secured and guaranteed by institutions. Instead, it has lost its structure and has become individualized. As the children and youths are being detached from the traditional patterns of socialization, they face a multitude of options. These options involve risks, and the young generation have to solve developmental tasks and social problems at the same time in a late modern city (cf. Böhnisch 1993, p. 74).

The capitalization of European cities, which massively started after World War II as a result of the booming economies, is progressing even further during Late Modernity and has undergone radicalization.

Therefore, all spheres of the spatial (and social) world are structured by means of (hidden) possessory interests and the distribution of power, rules and the principles of integration and exclusion. Children and youths perceive and experience the late modern city as fragile and contradictory. Various rationalities, which exist in a society at the same time, cause these contradictions. While some of the life conditions function in accordance with a goal-oriented logic of rationality, others are still ruled by the traditional, premodern logic or by the First Modernity (Giddens 1997). The inconsistent logic in these rationalities makes the spatial world, in which the children and youths grow up, fragile and contradictory.

Social geography approaches, in particular the so-called *action-centered social geography* with its subfield *social geography of children* largely contributed to the understanding of sociospatial problems which occur during childhood and adolescence in the late modern city. According to the action-centered theory of the *social geography of everyday regionalizations* (Werlen 1988, 1995a, 1997, 2000), the spatial world, the *material and immaterial artifacts*, i.e., objects and *spatial sections* made by human beings, are understood as the materialized, intended and/or incidental results of past actions. These results serve (or do not serve) as conditions for present actions. The relation between action conditions and action is dualistic in the *structuring* process (Giddens 1988): Social, physio-material and subjective action conditions make actions possible and, on the other hand, limit them at the same time. From this standpoint, the sociospatial problems of children and adolescents are no spatial problems, as e.g. sociopedagogical approaches in the field of sociospatial pedagogics see it, but problems of power and order in accordance with the thesis of highly ruled city. The *problem of acquisition* – the theme of industrial capitalist modernity – is no ‘spatial problem’ from this perspective, but a *problem of spatial action conditions* for actual action (Werlen 1997). Benno Werlen urges that social geography researchers should not investigate ‘space’ but “those actions with which the subjects produce and reproduce their ‘geographies’”. This is based on the hypothesis that *geography* is not just for “scientists. *Geography* is also made by all active subjects in their everyday lives” (Werlen 1997, p. 6).

Socio-geographic research is supposed to reveal the distribution of power which restricts the geographies of children and youths. From this

point of view, it is necessary to take sociospatial and socio-geographic measures, i.e. to create situations in which the individuals are enabled to give a meaning to their own actions. Deregulation and authorization are introduced to alter action conditions, to get up-to-date with modernization and to create a society that is fully rationalized, in which children and adolescents can make their geographies without any high ruled context (or negative action conditions, respectively) and where they can follow their *policy of life conduct* and are thus integrated into the late modern society.

2. New aspects of the sociospatial research of youth spaces – The divided city, the thesis of superfluosness and particular items of the approach presented

At the beginning of the 21st century, European cities and urban developments are marked by the increasing global economic integration. To stand up against other international urban competitors, to win the inter-urban competition with other communities, cities and regions, a city has to focus all its energy and resources onto the so-called 'entrepreneurial city', i.e. that part of a city that can be commercially exploited. The resulting site policy is supposed to provide an environment that encourages entrepreneurs to form new companies or to expand their businesses. When superior zones are developed for businesses of the third economic sector (e.g., banks, assurance companies, IT businesses), these zones expand massively, and a *drive-out architecture and regional planning* excludes social fringe groups from the city centers and attractive places of the European city. The thorough social and spatial exclusion of social problems or of people who are faced with social hardness, of 'those shaken off', the 'undesired' or the *losers of digital capitalism* (Böhnisch/Schröer 2000) is essential and facilitates the entrepreneurial goals as these problems disturb life within the 'entrepreneurial city', the economic centers.

The result of this urban policy, which is derived from the example of the Spanish city, is a struggle for social access; the further widening of the gap between poor and rich, and the increasing social and spatial exclusion of the 'undesired' leads towards the building and reinforcement of an *invisible wall* which *divides the city*: There is no place for the socially underprivileged in the 'entrepreneurial city'; it is accessible for the 'successful', for the 'global players' or the 'winners of the digital

capitalism' who own the social and/or economic tools and resources to buy spatial access to these places. The socially underprivileged are drawn into the 'city of those shaken off' or the 'superfluous or annoying city'. It is this spatial and social exclusion of these people which reduces their chances of getting access to the 'entrepreneurial city' someday and thus, of getting integrated into society.

The global economic integration results in a growing tendency towards the spatial and social polarization of the urban population, towards a new drifting apart of chances, as on the labor and housing markets, or concerning the accessibility of public institutions and the availability of education and training facilities, and finally it leads to the division or dichotomization of the city itself. The steadily growing tendency towards economic globalization, the so-called *digital capitalism*, does no longer lead to a discourse of *social emancipation and autonomy of all members of a society*, but – in accordance with the *postmodern principle of the segmented division of labor* – to the *socially extended redundancy of one part of the population and to the socially regressive redundancy of the other part (the 'non-productive' groups)* in Europe (Böhnisch/Schröer 2000, p. 64). Thus critical attention is being paid to the idea of a highly integrated society, in which everybody gains the same profit bit from the growing affluence, which the neoliberally exploitable 'social optimists' call the *elevator effect* (Beck 1986, p. 122-125).

The urban habitat has undergone massive changes due to the tendency of urban division. Children and youths acquire their (spatial and social) environment also in divided cities. However, the actual problem that adolescents are faced with is no longer estrangement (although they become more and more alienated from the spatial world due to the radicalization of capitalism) but rather the release, and thus the superfluosity, of humans in the context of the digital capitalist world. There is no longer a guarantee for all children and youths to become integrated into society by means of education and work. Many of them find themselves in a situation of steadily increasing pressure, others are completely detached from the economic process and become superfluous. While trying to keep up with the present development (e.g., the struggle for social access, the competition of generations, the pressure of coping and being successful etc.), the adolescents are subject to a steadily

increasing pressure. Each individual has to cope with this pressure and the feeling of needlessness in his or her own biography.

Now I would like to come back to the flashlight from the beginning of this lecture, which showed young people living in a 'superfluous' part of the Spanish metropolis: These young 'shaken off' people are conscious of their needlessness and have to cope with their situation in their biographies. They say they have a job "for some time, afterwards the whole thing starts over again." Others cannot even believe that they will ever be integrated into society by getting a job.

If young people try to acquire the spatial world nowadays to maintain their ability to act (possibly applying the acquisition tools of the 70s and the 90s), either nobody shows an interest in it (in the 'shaken-off' city) or they are kept or pushed away from the object they want to acquire (in the 'entrepreneurial city') by the spaceguards (private and state security staff); they are reported to the police, are being made criminals and they are stigmatized as 'juvenile rule breakers and delinquents'. As today nobody is interested in the underlying reason of such forms of coping applied by children and youths, acquisition actions do not result in social integration but intensify (spatial and social) exclusion. The tendency now is to react to "adverse behavior" using law enforcement rather than socio-pedagogical means.

The fact that parts of the population have been released or have become superfluous and that the pressure to keep up with others has generally increased, altered the action logic of many people. The socio-geographic concept of 'everyday regionalizations' was still dominated by an action concept that was marked by purpose and rationality and was thus related to the first or industrial capitalist modernity. Just unequally distributed action resources and varying might of the competitors are causing differences in the 'making of the geographies' and are controlling the patterns of integration and exclusion into and from spatial sectors. Young people both in the 'entrepreneurial city' and in the 'shaken-off city' may make geographies that are characterized by their age and situation, but the action logic varies due to the release mechanisms. Approaches which apply this rational purpose-oriented model of actions to explain the sociospatial phenomena in childhood and adolescence, may be useful to describe the 'policy of life' of integrated adolescents, i.e. those who write so-called 'life conduct maps'. The latter are indeed offered more and more chances to plan their lives independently.

However, these approaches lose sight of the *superfluous* children and youths, who suffer from the pressure to keep up with others, and they do not take into account their action logic either. The reasons why the latter make geographies should not be understood first of all as a problem of rationalization or systemization which is supposed to be identified and solved. With digital capitalism as background, the individuals have to cope with the problems and the anxiety caused by the 'threat of being shaken off' or the superfluosness, respectively at an individual level in their biographies. These geographies are not so much about a *policy of life conduct* and thus about the writing of 'life conduct maps' but about a *coping policy* (Böhnisch/Schröer 2000, p. 65.), which enables them to remain active in spite of their superfluosness and the increasing pressure of keeping up. As the making of the geographies is answered by a law-and-order reaction, the shaken-off young generation will not be integrated. Superfluous children and adolescents are shaken off from the very beginning and cope with their lives on territories of the institutional invisibility: they write *invisible (coping) maps*.

The approaches applied so far (such as the approach presented earlier in this lecture coming from the action-centered social geography) do not cover the sociospatial problems children and youths are faced with in a divided city. If researchers want to provide approaches to explain the present and future problems of adolescents in big cities, they have to start from the superfluosness thesis. Today's challenge is no longer to provide 'spaces' and to alter 'action conditions' to meet the present problems of growing up in the urban habitat (the 'New Poverty' and the impoverishment of more and more people, the growing general and juvenile delinquency, or the increasing problems of the integration of whole ethnic groups etc.), but to uncover the meanwhile invisible forms of coping with superfluosness and to explain the reasons behind. The socio-geographic approach of the *invisible coping maps* that have been developed in the fields of 'social geography of the childhood' and 'social geography of the adolescence' can be very helpful in this respect.

The approach of the *invisible coping maps* starts from the fact that children and youths growing up in a digital capitalist world tend to solve their problems outside the traditional socialization institutions (family, schools, social system). They write invisible coping maps when following their *policy of coping* and searching for orientation, for the meaning of life, for acknowledgement and self-esteem. The basic idea is that the

individuals (following the idea of making geographies) write their social (coping) maps daily in order to maintain their ability to act even in a world in which more and more people become superfluous.

The reception activities of children and youths in the divided city are deprived of their integrative component. Nobody is interested any longer in the reasons behind. And the (social) reaction is further exclusion. As the common approaches are so much focussed, the work children and adolescents do behind this *policy of coping* is not perceived. This is the point where future research in the field of children and youth welfare should step in: it is necessary to see coping maps as a whole, and to acknowledge the forms of coping in the invisible territories as an achievement. By rendering the invisible coping maps visible, it will be possible to investigate the significance of invisibility, visibility and the writing of coping maps for children and adolescents living in the divided city.

The concept of visibility and invisibility can replace the traditional clear division of private and public spaces. On one side of the dividing line, we will find those actions that will be made visible by the dynamics of the economized city and its institutions on the social, spatial and subjective background. On the other side, there will be those actions that are kept in or pushed into invisibility. As the coping maps are rendered visible within future research projects in the sector of juvenile socio-geography, attention should not only be paid to the visible reference of these maps (e.g., when youths are offered coping aids in institutions), or to the moment when these maps become visible (e.g., in case of conflicts with social norms and values), but above all to the significance of invisibility. From this new perspective, dead-end kids, e.g., would be regarded as children and youths who are forced to write all their maps in the invisibility to cope with their problems. And as an allusion to this invisibility, they should be called the *invisible youth*.

Future research in the field of 'social geography of adolescents' should orientate itself to the following three maxims: (1) Children and youths have the right of visibility; no effort should be spared to offer all young persons the chance to cope with their problems in visibility. (2) Children and youths have the right of invisibility; and making things visible (by adults) should not interfere with this right. (3) Children and youths have to have the possibility to 'make themselves visible'. They

have the right to find and test the borderline between visibility and invisibility (in a playful manner).

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PART III

CIVIL SOCIETIES AND THE STATE: THE ROLE OF RELIGIOUS COMMUNITIES

THE ETHICS OF SOCIAL DEVELOPMENT: A BIBLICAL AND THEOLOGICAL PERSPECTIVE

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Abstract:

The social structures are not inhuman realities. They are a reflection of the collective activities of people and are absolutely necessary for the development of a society. The ethical grounds of social actions do not guarantee their effectiveness. Similar to the concept of social ethics, social development became established in the realm of socio-humanistic sciences in the 19th century, aiming to assess in qualitative terms the global state of a community by referring to other criteria in addition to those strictly related to economic growth. In the modern era the concept of economy has become prevalent and also its perception in the public mind has changed radically. Economy is no longer identified with the order of the vital necessities, but is expressed in the model of rational conduct developed through exchanges on the market, which has nowadays turned global. From this perspective, not only economic goods, but work itself becomes “merchandise” to be sold and purchased in exchange for a “salary”. According to Marxist theories, the structures of inequality and radical conflict, inherent in the capitalist production pattern, create the conditions for the shift to the socialist economic system.

In the theories listed above one can perceive the absence of the human subject and his dignity, beyond the hypostases of entrepreneur or worker. The inclusion of man and his dignity in the economic theories of social development supposes an overture of economy towards ethics and anthropology. The Church Fathers first developed a vision of man and society that would later underpin the essential ethical coordinates for the defense of the dignity of each human person in the context of social development. Man is an icon or image of God on earth. This is fundamental theological paradigm on which human

dignity is founded. Theological ethics has emphasized the fatherhood of God to institute human fraternity.

Keywords: Economy, ethics, social development, human dignity

It is a pleasure and honor to participate in this international reunion which focuses on the theme of social development and social assistance.

This is a most topical theme if one considers the bleak outlook on the future that statistical research provides. Researchers in the field show us that nowadays, on our planet, almost three billion people live on less than \$2 a day, while 10% of the world population of the world produces and consumes 70% of resources. According to UNICEF reports, 25,000 to 30,000 children die every day because of poverty; 1.1 billion people in developing countries do not have access to drinking water, whereas 2.6 billion do not have access to primary health services; the gross domestic product of the world's poorest 41 countries, where 567 million people live, is worth less than the combined wealth of the world's richest seven people; the gap between the average wealth of the poor and of the rich has been on the increase throughout the past century as follows:

- 11 to 1 in the year 1913;
- 31 to 1 in the year 1950;
- 44 to 1 in the year 1970;
- 72 to 1 in the year 1992.

Obviously these are data of economic statistics which cannot provide much information without a critical analysis of underlying causes. However they are a cause of deep concern and as such they fully justify our debate today.

Given that my area of interest is theology, with your agreement, I will present some theological and ethical principles which can be assumed as prerequisites for coherent social development and responsible social assistance. Before we proceed, we believe it is necessary to clarify the concepts of social ethic and social development.

I. The concept of social ethic

If one should refer to original meaning of ethic, i.e. the one present in the works of Homer identifying ethic with the cradle of ancestors, the home of a family or the homeland of a human community, then one could say that social ethics is the effort that a human group or community makes in order to establish an order that is as good and as right as possible for all its members. However, this definition and understanding of social order is of recent date and is linked to the *sui generis* discovery of social structure and groups as autonomous realities, with a profound impact on human life and dignity.

Research in this field has shown that until the 19th century there had been very few works on social ethics either in moral theology or philosophy, because social life was identified with relationships between persons and therefore social ethics was not distinguished from personal ethics. The same virtues or values had to be cultivated both in the social and the private life. That is why someone seen as a good parent, spouse or friend was likewise considered to be a good citizen, devoted to common good and social values. Beginning with the 19th century, against the background of new economic and political theories, many more works dealing with social ethics were published, emphasizing the fact that social ethics principles must not be limited to the norms of personal conscience because, in the capitalist society, the living conditions of a person are not dependent solely on their professional and moral qualities, but rather, to a large extent, on the economic and social structures over which the person no longer has any power. These structures, in which all the major decisions are taken, shape and influence the future and living conditions of all the social actors; they give priority to social determinations over personal decisions. Hence the importance attached to the concept of social ethics and the role of such ethics in promoting and defending the dignity of human persons who, in the new economic and social context, run the risk of suffering the alienating consequences of unjust social structures.

Obviously though, social structures are not inhuman realities. They are a reflection of the collective activities of people and are absolutely necessary for the development of a society. Therefore they do not constitute a rigorous determinism in human existence, yet they also cannot be easily changed through simple personal action when they become unjust institutions or generate social injustice. It would be

delusive to believe that the good will of a person or a group of persons, their openness and candor in interpersonal relations would generate, of themselves, profound social transformations.

In other words, the ethical grounds of social actions do not guarantee their effectiveness. For example, the emancipation of slaves in Africa in the 19th century was a gesture of profound ethical significance, yet in the absence of a prior objective analysis of social conditions and collective mentality, the slaves ended up in a state of abject poverty so that forced labor was introduced to reestablish the social and economic balance.

Based on this example we can conclude that social ethics, in general, and Christian social ethics, in particular, cannot disregard the objective conditions of human existence. As a result, Christian social ethics is drawn closer to the realm of economy and politics, while it also must pay close attention to the potential of social development based on fundamental human values.

II. The concept of social development

Similar to the concept of social ethics, social development became established in the realm of socio-humanistic sciences in the 19th century, aiming to assess in qualitative terms the global state of a community by referring to other criteria in addition to those strictly related to economic growth. In this regard, Auguste Comte, in his work *Social Dynamics* argued that social “progress” is not identical to ordinary improvement, but involves “development” whose nature is primarily ethical and the factors determining it are essentially intellectual or cultural.

Other researchers have stated that structural factors prevail over the cultural ones in social development. Generally it is the researchers inspired by Marxism who emphasize such factors which, when changed also cause people to change in terms of how they earn their living and interact socially. According to Marx this happens because the means of production of material goods condition social life. This perspective is accurate only if it is limited to the economy and is not used as an evaluation criterion for all social development, including the symbolic constructs and the hierarchy of values in a particular human community. The Greek antiquity was keenly aware of this fact as it used the term economy to refer to the management of the home (*oikos*) defined as the place of family life and also of production of goods. Greek antiquity

distinguished between the economic order, of vital necessities, and the political order, where the actions and relationships of free and equal people unfold. From this perspective, the concept of political economy seems devoid of any meaning, as it expresses two distinct realities: the former, the economy – common to people and animals, the latter, politics – the essentially human order.

In the modern era the concept of economy has become prevalent and also its perception in the public mind has changed radically. Economy is no longer identified with the order of the vital necessities, but is expressed in the model of rational conduct developed through exchanges on the market, which has nowadays turned global. The condition for this “rationalization” is, according to economists, the shift from the “utility value” of goods to the “exchange value”. This profound change has been achieved and generalized by capitalism. It has replaced the exchange formula goods-money-goods with the formula money-goods-money. In the former formula, money is simply a means of exchange and not a value in itself; in the latter, a surplus of value or more accurately of capital is involved, resulting from exchange transactions. This shift of emphasis has transformed the economy into a process in which the criterion for ranking and evaluating a product is no longer the “utility value”, but rather the “rate of return” or the efficiency gained through exchange instruments. From this perspective, not only economic goods, but work itself becomes “merchandise” to be sold and purchased in exchange for a “salary”.

Starting from this reality, where work becomes “merchandise”, the economic theories derived from Marxism, have criticized the capitalist system, claiming that the price or the value of work is no longer determined by the real needs of the “paid” worker, but by the market fluctuations in terms of demand and offer. The use of the worker in the production activity is dependent in this case on the projects and the choices of the entrepreneur who buys labor. The economic exchange is thus achieved as a relation “between equals” on the formal level of market transactions. Yet this exchange is only “productive” in terms of a radical inequality between two social classes: on the one hand, the business owners who control the capital and can freely direct the labor market; and on the other hand the “proletarians” who are forced to sell their labor force to make a living.

The theories inspired by Marxism view industrial capitalism as the most advanced and also the final stage of social development based on the market economy. According to Marxist theories, the structures of inequality and radical conflict, inherent in the capitalist production pattern, create the conditions for the shift to the socialist economic system.

The economic theories inspired by Marxism were of course critically evaluated by researchers such as Max Weber and Joseph Schumpeter. They pointed out the dualist and conflict-based Marxist model and focused on the work of the entrepreneur. Weber argued that the actions and conduct of the entrepreneur are intended to make the means achieve the goals he has set himself, motivated by the principle of efficiency and profitability. Schumpeter defined these activities in terms of innovation based on combining the production resources and modifying them with the help of credit, the action of the entrepreneur being a model of social development.

From this perspective, Weber, as opposed to Marx, argued that while there is no alternative to capitalist economy, it can evolve into a mechanism that achieves all its potential until the physical and mental collapse of mankind.

In the second half of the last century, Fernand Braudel wrote the work *Capitalism and Material Life* (1979) which marks a distancing from the above mentioned theories, by distinguishing between capitalism and market economy. Capitalism, according to Braudel, emerged and evolved on the basis of an already formed market economy. It did not create the market economy but rather penetrated it through “speculative” games, which nowadays no longer comply with the requirements of “transparency” and “regularity” necessary for “daily life”. One may note that Braudel criticizes the theories which identify the capitalism system with the market economy. In his view, capitalism is “an accumulation of power, one that bases exchange on the balance of strength as much as or more than on the reciprocity of needs”, which is why it does not appear to be “the last word in historical evolution”.

III. Theological ethics and social development

In the theories listed above one can perceive the absence of the human subject and his dignity, beyond the hypostases of entrepreneur or worker. The inclusion of man and his dignity in the economic theories of social development supposes an overture of economy towards ethics and anthropology. The absolute need for such overture has been demonstrated by Max Weber. He noted that before prevailing of the economic level, capitalism first had to achieve prominence on the moral and cultural levels. In other words, an overall change in mentality was needed in all social strata. Weber considers that Protestant ethics had a central role to this effect, by achieving the transfer of asceticism from the monastic space to the worldly one.

This transfer also caused a radical change in the institutional and entrepreneurial structures. The old monastic rule – *ora et labora* (prayer and work) – became the rule of the entrepreneur in managing material goods and money. His attitude and behavior was no longer founded authority relationships but on personal accountability and self-control. Discipline and daily self-examination favored the entrepreneur's rational conduct, in the initial stage of capitalist social development and, at the same time, raised the awareness of the worker and stimulated his loyalty and responsibility as well as the attitude towards work.

One must also emphasize that this mentality and state of mind which fundamentally shaped social development in the modern age was preceded by the Patristic age or of the Church Fathers. Due to the historical context, they were not primarily concerned with social development but rather with the moral and spiritual edification of the human person, considering that coherent social development was not attainable without moral edification and social justice was not possible without moral justice. That is why the Church Fathers first developed a vision of man and society that would later underpin the essential ethical coordinates for the defense of the dignity of each human person in the context of social development.

III.1. Human dignity

Man is an icon or image of God on earth. This is fundamental theological paradigm on which human dignity is founded. This statement also constitutes the nucleus of the anthropology featured in the Genesis, the first book in the Torah. The Genesis does not specify however what

the image of God in man consists in, but suggests an avenue for the interpretation of the concept, starting from the statement: “God made man (Adam – in Hebrew, Antropos – in Greek) in His image, man (*Ish*) and woman (*Ishah*)”.

The word Adam is a symbolic name defining the universal human nature which is hypostatized in the personal otherness of the male and the female. That is why the word Adam is difficult to translate in other languages. It suggests however that there is an ontological unity of the whole humankind, yet the unity is not uniformity. It does not exclude the creative plurality of persons, just as the plurality of persons must not destroy their ontological unity. From this perspective, this human person is unique, so that it cannot become a simple statistical element that could be eliminated, manipulated or marginalized. In other words, each person is an icon that must bear the glory of God in history and this grants it dignity and eternal value before the Lord and before other persons.

The symbolical language of the Genesis emphasizes the fact that man can only know and keep his dignity through his free, conscious and responsible relationship with God, and through God with the whole creation. Leaving the communion with God equates with the loss of dignity and man's inclusion in the circle of slavery, existential exile and ultimately death. The Genesis reports that man himself chose to break the communion with the Lord and when He looked for him “in the cool of the day” (Genesis 3: 9), man “hid”. When he was found, man did not admit his guilt but instead sought to justify his act, accusing “The woman you put here with me—she gave me some fruit from the tree, and I ate it.” (Genesis 3: 12)

One can conclude from this that man fallen into sin no longer perceives the Lord and his neighbors as friends, but as strangers, who threaten his egocentric individuality by their very presence. Losing his own dignity through sin, man fails to acknowledge the dignity of others. This gives rise to a crisis in human existence with a multiple historical expressions:

- Spiritual crisis (perverting the relationship with God)
- Moral crisis (mistaking evil for goodness)
- Social crisis (Cain kills Abel)
- Ecological crisis (the earth is cursed)
- Economic crisis (the earth does not yield its fruits to an egotistic and egocentric being).

In such a situation, humanity can be overwhelmed with despair. God however intervenes and promises a way of regaining the lost dignity: “And I will put enmity between you and the woman, and between your offspring and hers; he will crush your head, and you will strike his heel” (Genesis 3: 15). Most researchers have interpreted the text from a messianic perspective of restoring man to his original dignity. The same perspective may be found in the prophetic books of the Holy Scripture.

III.2. The defense of human dignity

If one analyzes the text of the Holy Scripture and the prophetic books in particular, one can discover the same paradigm, present in the Genesis, but extended to the whole community of Israel. The prophets themselves saw the community as a unified whole, with distinct personality and calling among the other persons. According to the prophets, the community of Israel represents the “priest” of humanity and is called to share with the world the experience of the relationship with God. Of course, the prophets acknowledged the dignity of each and every Israelite, but they simultaneously defended the dignity of the community in general, for God’s covenant concerned the whole community and not just a person. Even the covenant agreed with Abraham had a communal significance as it involved the Abraham’s successors. This profound relationship between the person and the community is possible because, according to the prophets, the community is not to be mistaken for an amorphous mass or with the sum of its parts. The community, just as the person, is a part that carries the whole in itself; it is a *qahal* (in Greek *ecclesia*) whose voice (*qol*) glorifies the Lord. Like the person, the community does not escape the temptation of triumphant, autonomous and self-sufficient attitude in the relationship with God: “Hear, O heavens! Listen, O earth! For the Lord has spoken: “I reared children and brought them up, but they have rebelled against me (...) But Israel does not know, my people do not understand” (Isaiah 1: 2-3). The prophets called for the conversion (*teshuba*) of this self-sufficient awareness to lay the ground, in their historical present, for the messianic future of the restoration and the reconciliation with God. The conversion of one’s conscience or in biblical terms the conversion of the heart is necessary to respect the dignity of each person, especially of those who are marginalized: the foreigner, the widow or the orphan.

The conversion of conscience is a prerequisite found in all the prophets but especially in Jeremiah and Ezekiel. Due to the emphasis laid on this prerequisite, as a necessary condition for preserving and affirming human dignity, first in the person, the prophets' attitude cannot be mistaken for social or religious activism; it is a non-aggressive attitude which demonstrates that the biblical prophets were not only "persuaded" of the importance of their message, but they were filled with the "presence" of God. There is a qualitative difference between being "persuaded" and "filled" by a spiritual reality. To be filled with the presence of God means accepting the vocation of serving God, for the service and defense of human dignity. Obviously the defense of human dignity may hurt those who do not respect it, that is why the call of the prophets may hurt, yet the wound it causes is a healing and release. In other words, the presence of biblical prophets upsets and raises negative reactions in any person or community who asserts themselves with pride, while disregarding and offending the dignity of other human persons or communities. Therefore, we could argue that the biblical prophets are the model of critical conscience in history, guarding the defense of human dignity before the Lord.

III.3. Theological ethics – a critical reference for modern conscience

Given that nowadays too human freedom and dignity are questioned, that persons and whole communities are sometimes considered to be just statistical elements or instruments of manipulation, the ethics of biblical prophets as well as the whole theological ethics can become a critical reference. Also the conscience of the prophets can be instituted as our better conscience or our repentance, when we abandon our human dignity, granted by God Himself and our let own self or that of others be perverted. To make the case for the need of the ethics of the biblical prophets to be a critical reference, we will provide several examples starting from a study by a contemporary Dutch theologian aptly called *The Fatherhood of God in an Age of Emancipation*.

Theological ethics has emphasized the fatherhood of God to institute human fraternity. However modern mentality has denied the fatherhood, by often establishing instead an ideological oppressive and restricting ideological paternalism. For instance, Marxist ideology, on which totalitarian and atheistic communism was founded, focused on the

total emancipation of the human being. Starting from this idea, communist dictatorships replaced fraternal unity in God with an abstract fraternity of “brethren” and “comrades”, the sons of the single party. Stalin’s claim that the state was a family and he was the father is famous to this day. In other words, communist ideology usurped the fatherhood of god and replaced with the paternity or rather the paranoid paternalism of the political leader. One can clearly observe that in the modern age the fight for emancipation has been won, yet it has not been necessarily followed by the full assertion of human dignity. The discrediting of God’s fatherhood and of moral values often leads to the unconditional submission to other “pseudo-fathers”: gurus, leaders of sects or representatives of ideologies with a questionable record of respecting human dignity. This fact has been competently highlighted by a contemporary theologian who declared at an international conference: “The self-aware and egocentric generation of earlier years who opposed any definite commitment, any political and social decision, has given way to a generation that happily sacrifices its own judgment to identify with strong leaders. The youth today are therefore tired of freedom. They want a powerful leader, an object to devote to and occasions to sacrifice. They do not realize that many of these causes will lead them to catastrophe”.

It is worth noting that these words were written by the German author before World War II. After the experience of the war and the dictatorships that emerged afterwards, it is natural to ask ourselves now if words *Shema Israel* uttered by the biblical prophets could become the existential paradigm of all spiritual guides who fight for the freedom and dignity granted by God to each human person and community, as the ontological premise of any social development.

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SOCIAL ECONOMY – A NEW APPROACH IN THE EUROPEAN DISCOURSE ABOUT SOCIAL INCLUSION?

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Abstract:

The European Community and the Member Countries exercise a shift from state or market-provided paid work and social services to “civil society” as a “new employer” and a “new provider” as the way to preserve “more democratic, more justice and more egalitarian society” in the future. Some hope that the “social economy or third sector” could make a very important contribution to achieve these goals. The presented paper focuses on 1) social inclusion policy in the EU 2) data about the main target groups of social inclusion policy 3) social economy a means of social inclusion, 4) the three approaches regarding the social economy as a project of civil society.

Keywords: social economy, third sector, civil society, social inclusion policy, EU, social exclusion

Introduction

The financial crisis of the welfare state has caused the shift from the distribution of wealth in name of social justice to a “demanding and repressive” state or “enabling state”, which combines the social rights with social responsibility and promotes workfare programmes which differentiate between the “deserving” and “undeserving” poor. The domination of neo-liberal discourse in politics and belief in a market mechanism (or “invisible hand”) as a major factor in social inclusion and integration evidently has to be questioned with reference to statistical data regarding long-term unemployment, the growing distance between the rich and poor and the pauperisation and marginalisation of many groups of people, including even the middle class – a situation which the latest developments in the USA documents clearly. In short, the welfare state crisis means the real danger of the pauperisation and marginalisation

of large sectors of the population and may create “injustice, repressive and intolerant society” in the near future.

But what answers can we offer in response to this development?

The European Community and the Member Countries exercise a shift from state or market-provided paid work and social services to “civil society” as a “new employer” and a “new provider” as the way to preserve “more democratic, more justice and more egalitarian society” in the future. Some hope that the “social economy or third sector” could make a very important contribution to achieve these goals. In the presented paper I'm going to focus on 1) social inclusion policy in the EU 2) data about the main target groups of social inclusion policy 3) social economy a means of social inclusion, 4) the three approaches regarding the social economy as a project of civil society.

Social Inclusion Policy in the EU

Since the announcement of the European Council conclusions in Lisbon 2000 that the strategic goal for the EU is to become by 2010 ‘the most competitive and dynamic knowledge based economy capable of sustainable economic growth and with more and better jobs and greater social cohesion’, social exclusion has been put on the Social Agenda.

The EU defines social exclusion as a multidimensional process, whereby ‘people are pushed to the edge of society and prevented from participating fully [in economic, social, political and cultural life] by virtue of their poverty’ (Commission and Council, Second Joint Inclusion Report, 2004).

Meanwhile a much bigger stress in the EU’s political rhetoric will be put on the social inclusion and policy of active inclusion although combating poverty and social exclusion seems to be the flip side of the coin of inclusion and policy of social inclusion.

The Council of European Union points out in the Joint Report on Social Protection and Social Inclusion 2007 that: “Active inclusion emerges as a powerful means of promoting the social and labour market integration of the most disadvantaged.” (2007,2). The active inclusion means primarily increased conditionality in accessing benefits and is a major component of the social inclusion policy. On the other hand, that active inclusion doesn’t avoid a high danger of pushing unable to work further into social exclusion (Council 2007, 2).

Whom is the policy of social inclusion addressed to? Theoretically, every individual could be considered to be a target of social inclusion, but in fact the EU will focus on “the most disadvantaged”. Who could be classified in such a category? Referring to the description above, the following main target groups of social inclusion policy are the following:

- the working poor
- unemployed people
- groups at risk of poverty
- women
- disabled people
- immigrants

Working poor

The EU policy of social inclusion considers being in employment generally an effective way “to secure oneself against the risk of poverty and social exclusion” (Bardone/Guio 2005, 1). But it also recognises that “holding a job is not always sufficient to escape poverty, a particular family structure, such as one with two or more dependants and only one earner, or low earnings, resulting from a range of labour market problems including recurrent unemployment, inability to find full time work and low wage rates, are at the origin of the problem of the so –called “in work poverty” (Bardone/Guio 2005, 1).

The rate of the working poor in the EU is estimated at 7% of the employed population, there are about 14 million people, living in a household whose equivalised income is situated below the national poverty line (Bardone/Guio 2005,1) Particularly vulnerable are lone parents or sole earners with children. The highest rate is 30% (2001: Netherlands and Portugal), the lowest one 4% (2001: Denmark) (Bardone/Guio 2005,4).

Therefore it is not very surprising that the new debate about active inclusion in terms of minimum income has started. This was the main subject of the European Commission Conference on Active Inclusion, Brussels, 15 June 2007. One of the speakers at this conference, John Veit-Wilson, from the University of Newcastle upon Tyne, England points out that prevention is better than cure and clean water prevents diseases better than pills do and adequate minimum incomes are the clean water of

active inclusion policies. One could conclude social policy should maintain adequate minimum income for every worker.

Table 1: In-work poverty risk by main characteristics of the employed population, EU-15, 2001 (%)

	BE	DK	DE	EL	ES	FR	IE	IT	LU	NL ¹	AT	PT	FIN	SE	UK	EU15
Total	4	3	4	13	10	8	7	10	8	8	6	12	6	3	6	7
Dependent employees	3	1	4	5	7	6	6	7	8	:	3	7	4	2	5	6
Self-employed workers	10	15	5	25	20	25	16	18	2	:	24	28	17	22	14	16

The problem is that the rate of in- work poverty in the EU-15 is eminently higher in the case of self-employed workers than in the case of dependent employees. Even if the reliability of income data for the self-employed is not guaranteed, the regulation of minimum income in this case is politically and practically not a very easy task. Another crucial question of this debate is how far power and interests of the market economy in some State Members to keep labour cost as low as possible can be successfully overruled.

Unemployment

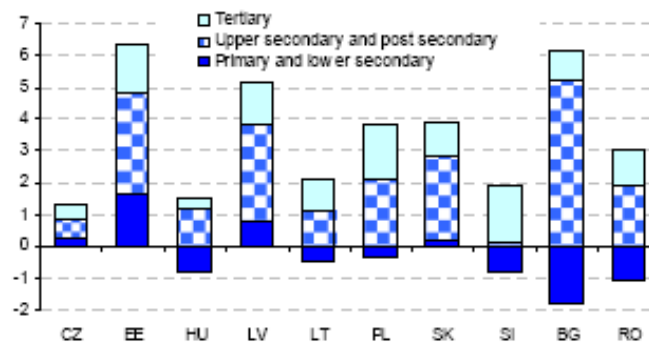
In 2006 there were more than 19 million people unemployed in the EU -25, that means the unemployment rate is 9,1 %, the highest rate is 16,3% (Poland), the lowest one 4,3% (Ireland).

The dream of all inclusiveness or full-employment as a result of the economic growth seems to be denied by some statistical figures, especially in the case of the so-called: EU 8+ 2, which includes the New Member Countries of Eastern Europe. Regarding the World Bank EU8+2 Regular Economic Report May 2007, the improvement of the employment data doesn't refer to all categories of labour:

“Employment growth was driven mainly by upper- and post-secondary graduates (Chart 32). Secondary graduates contributed most to the employment growth in all countries across the region but Slovenia. Employment of unskilled primary and lower secondary graduates diminished in Bulgaria, Romania, Slovenia, Hungary, Poland and Lithuania” (World Bank 2007).

Chart 32. Low-educated labor loses jobs

Contribution to employment growth by education level (2006)



Source: Eurostat

Still the unskilled primary and lower secondary graduates can be considered a high risk-group on the labour market and the absorption possibility of them seems to be quite limited. In case of the 6 countries, independent of the economic growth, the employment of this group has been diminished.

Also the level of long-distance unemployment has not changed very much in the last three years and the total number for EU-25 was nearly 8, 5 million people. Nobody is going to believe that the market economy is able to include this amount of people in a short, middle or even in a long time. Even the active labour market policy (policy of active inclusion) does not promise a satisfactory solution. For some countries the problem of long-distance unemployment can be considered very urgent. To these countries counts Slovakia (11,3%), Poland (9,1%), Germany (5,9%) and Greece (5,1%). Women are more frequently victims of long-distance unemployment than men.

Long-distance unemployment rates by countries

15-64 years	2006q1 (1000) ^a	Men and women		
		2006q1	2005q4	2005q1
EU-25	8,435	3.9	4.1	4.1
Euro area	5,726	3.9	4.0	4.0
Belgium	199	4.4	4.3	4.6
Czech Republic	217	4.2	4.1	4.5
Denmark	27	1.0	0.9	1.3
Germany	2,417	5.9	6.1	5.6
Estonia	22	3.3	3.7	5.0
Greece	244	5.1	5.0	5.4
Spain	418	2.0	2.1	2.5
France	1,039	3.8	3.7	3.7
Ireland	29	1.4	1.4	1.5
Italy	882	3.6	3.9	4.0
Cyprus	4	1.0	1.2	1.3
Latvia	38	3.4	3.4	4.9
Lithuania	49	3.1	3.6	5.7
Luxembourg	.	.	1.2	.
Hungary	135	3.2	3.4	3.1
Malta	5	3.1	3.3	3.2
Netherlands	163	1.9	1.9	2.0
Austria	56	1.4	1.3	1.4
Poland	1,502	9.1	10.0	10.7
Portugal	222	4.2	4.2	3.7
Slovenia	32	3.2	3.5	3.1
Slovakia	300	11.3	11.4	12.3
Finland	55	2.1	2.1	2.4
Sweden	.	.	.	1.2
United Kingdom	322	1.1	1.0	1.0
Bulgaria	178	5.5	6.0	6.5
Croatia	.	.	7.3	.
Romania	438	4.7	4.0	4.7

Source: Eurostat

Risk-poverty

16% of the EU population live at risk of poverty. It means around 72 million citizens are considered to be at risk of poverty in the EU25. This figure, calculated as a weighted average of national results (where each country receives a weight that equals its total population), masks

considerable variation between Member States. At one extreme, countries with the highest poverty rate are Slovakia, Ireland, Greece (21%) followed by Portugal, Italy, Spain (19%) and the United Kingdom and Estonia (18%). At the other extreme, the share of the population at risk of poverty is close to 10% in the Czech Republic (8%), Luxembourg, Hungary, Slovenia (10%), followed by Finland and Sweden (11%), Denmark, France, Holland (12%) and Austria (13%). The remaining countries face intermediate poverty rates close to the EU average.

Social economy – a means of social inclusion

The quoted statistical data documents very clearly the inability of the market economy to include the whole labour manpower and lead to the search for alternatives and one of them appears to be social economy. In the Joint Report on Social Protection and Social Inclusion 2007 the social economy is mentioned as “a vital source of jobs, including for people with poor qualifications or reduced work capacity, and provides social services not met by the market economy” (European Commission 2007, 6).

The idea of social economy is rooted in the utopian socialism and worker class movement in the XIX century and in Christian solidarism movement as well. Where in the past the worker-class and peasants (farmers) were the main promoter of co-operative, mutual organized, independent organizations, nowadays, civil society is considered to be an important factor for production of welfare in society, including promotion of social economy. The idea of an active role of civil society in the social inclusion policy is embedded in the EU-governance concept:

“Accordingly, the EU has set about promoting civil society as a solution to a whole range of problems including political legitimacy, the “democratic deficit”, citizenships and personal responsibility, industrial competitiveness and social and economic cohesion.” (Rumford 2001, 209, see: Edquist 2006).

As mentioned above, this broad perspective concerns also question of the role of civil society as organizer of social economy on the local level (see: UNO 2001, 13). Referring to this perspective, critical questions could be raised concerning the danger to overestimate the power and role of civil society regarding possible corrections of the negative, disruptive and marginalising aspects of the failure of market and the weakness of the (welfare-) state (Giddens, Esping-Andersen,

Kaufmann, et al.). In other words – how far are organizations of civil society able to create a base for its sustainable development. How far could they involve groups of people who are social excluded or are they in danger to be excluded? One possible answer gives the discourse and research of the “third-sector” or “social economy” regarding the building of social capital by providing social services to social excluded groups or by offering new work places (The European Employment Strategy – EES – final report: Strengthening the local dimension of the European Employment: Feasibility Study on Indicators for Local and Regional Levels and for the Social Economy, 2004, 3, Westlund, 2003).

Theoretically, there are three different approaches regarding the social economy as a project of civil society: integrative, subculture based and emancipative.

	Integrative approach	Subculture based approach	Emancipative approach
Value-system	Liberal-democracy	Participative democracy	Democracy from “below”
Goals	Social cohesion	Independent life style	“new society”
Relation to State	Dependent	Subsidiary/ independent	independent
Relation to Market	Co-operation/ non-competition	Co-operation/ competition /self-reliant	Self-reliant / competition
Beneficiary	most disadvantaged	Ethnic groups/ local communities/ dropouts	most disadvantaged/ ethnic groups/ local communities/ dropouts/peasants /women/
Support system	State/Market/Civil Society	State/Civil Society	Civil Society
Social work	Social management/ social control	Indigenous social work/empowerment	Acting social work/political action

The Integrative Approach of Social Economy

The EU social inclusion policy is based on the assumption that social exclusion threatens social cohesion, and produces the social and economic loss and jeopardizes economic development for the future, and the employment strategy is a most integrative one. The main road to social cohesion or to the high level of social integration seems to be paid work for everybody. Ruth Levitas points out that the EU social inclusion policy operates with two different discourses: an “economic one” and a “social one”(Levitas 1996, 9). “The economic discussion is couched in familiar terms of efficiency and deregulation, and the need for economic growth. But alongside this can be found the “social” discourse, which again is about solidarity, integration and cohesion opposed to social exclusion – with exclusion again referring to exclusion from paid work” (Levitas 1996, 9). We can say that the integrative approach of social economy bases on this double structure of arguments. What could be surprising is the fact that both these discourses appear to be contradictory (Levitas 1996, 9) or not quite compatible to each other. In spite of this the large number of social economy organizations is arguing the same way as the EU does. This expresses very clearly the Declaration of the Social Economy organizations proclaimed on the European Social Economy Conference in Salamanca, 27-28 May 2002:

“That they (social economy) organisations highly appreciate the effort being made to build a society with a good cohesion, an effort imposed on itself by the European Commission since the Lisbon Summit, and they consider it indispensable in a society with serious poverty pockets and growing threats of social exclusion.

That this endeavour has to involve all social and economic actors, among which social economy feels specially committed, since social cohesion responds to the values of solidarity on which Social Economy itself is based.” (2002, 1)

Further they stress very strongly “social cohesion” as the main goal of social economy:

“That social cohesion, an unquestionable aim to build a more equitable society, is not going to be otherwise attained but basing on active work for inclusion, which in turn requires an integrating view of economic, social, training and other policies” (Declaration 2002)

The role of social economy in the EU social inclusion policy they express their hope that “appropriate attention should be paid to the

remarkable experience of social cooperatives and insertion-social enterprises networks, mainly by developing its legal definition in those Member States where there is none” (Declaration 2002).

At last they believe that “both Public Authorities and Social Economy should establish partnerships that increase synergies and help to build a society with better cohesion” (Declaration 2002).

The integrative approach is not unproblematic and raises many critical *questions*:

1. There is a strong focus on the social economy as a “job-machine”, therefore other functions like: building social capital, democratization or social change seem to be more or less neglected;
2. There is a high level of dependency on the state support: legally and financially as well;
3. The result of this dependency is a limitation of economic activities of social economy; there cannot be competitors for free-market enterprises, therefore it can be actively niched;
4. There is a high level of stigmatisation both from the market and from society ;
5. Social economy is partly – from the integrative perspective - the provider of manpower for so-called first labour market which is dominated by different principles of organization and economic functions. These questions are the main ideas and principles of social economy like “1. The aim if serving members or the community, rather than generating profit; 2. An independent management; 3. A democratic decision making process; 4. The primacy of people and labour over capital in the distribution of income” (Defourny, J. 2001, 6).

According to these critical remarks it is very hard using integrative approach, to share such optimism expressed regarding social enterprises (as a special case of social economy) that it can “extend democratic participation and social capital to socially excluded segments of the population, who, despite the prospective benefits of post-industrialism, have stayed trapped in the margins of society” (Gonzales 2007, 2003).

Subculture based approach of social economy

In the post-modern world we become more sensitive to and aware of phenomena of multiculturalism and pluralism of values, life styles, life conditions and so on. On the other hand the indigenous communities and groups demand not only acknowledgement of their right to live in accordance with their culture but also to be protected from discrimination or even genocide danger coming from the international or domestic superiority which can be economical or political or of religious origin. In their struggle for survival the social economy appears as an important means to gain some extent of independency. The case of Zapatista in Mexico is a very important lesson in this respect (Boyer 2006,). The development of economic co-operation in the Zapatista communities took quite a long time and resulted in self-organization of many aspects of social life: schools, consumer-co-operatives, self-ruled credit institutions and autonomous health service (Boyer 2006,106). Social economy in Chiapias region is relatively independent from the state. Its relationship to market varies from self-reliancy to involvement in the market competition, especially in the case of coffee export to developed countries. Social economy seems to have an important contribution to preserve the ethnic identity and culture of Zapatista. The development of social economy in the Chiapias region is one of successful examples.

Regarding subculture or indigenous based social economy, we can also learn a lesson from Brazil, where there are some interesting projects of economic co-operation among the indigenous groups (Müller-Platenberg 2006).

The main function of social economy from the subculture based approach seems to be the preservation of the culture identity and the way of life of communities. They use their binding social capital: solidarity and trust and in many cases learn to practice participative democracy. In the EU-social inclusion policy the subculture based approach of social economy is not really debated.

The Emancipative Approach

The emancipative approach is based on left criticism of capitalistic market and its vision of the “new society”, free from oppression and exploitation of the working class and underdeveloped regions. It is a dream of solidarity, equality and justice in society, a dream, which could be realised in the micro-world of social economy and in global anti-

capitalistic movement. Therefore social economy “can (...) be considered a «grass-roots» based, regionally oriented federation of decentralized, autonomous enterprises run on the principles of basic democracy” (Elsen/Wallimann, 1998, 152; Arcoverde 2007, 4). The characteristics of social economy as the new solidary social form of production are: 1) production of goods and services that are addressed to satisfy the needs; 2) social ownership of the means of production; 3) democratic-based control and decision making; 4) unity among wealth, ownership and use of the means of production; 5) solidarism as the basis of co-operation in work and production processes (Arcoverde 2007, 4). Driven by such value-based concepts, many concrete initiatives and projects indeed attempt to put it into practice. How far is it possible due to formal requirements regarding the legal registration? The interesting results about the emancipative potential of social economy brought the survey conducted among the social enterprises (166 cases) in Pernambuco Brasil (Arcoverde 2007). A high percentage of the asked social enterprises in Pernambuco has got a hierarchical structure, but “in terms of decision making, a large part of the business (42.2%) it happens in meetings or 19.3% in previously communicated assemblies in which all should attend and participate” (Arcoverde 2007, 11). Regarding the organization of work there is difference between social enterprises with division of tasks (61,4%) and without (38%). What does surprise is the finding of 74.1% or 123 businesses that do not have any source of external financing. What distinguished the solidary economy from market-driven/ or profit driven economy is that “81.2% of the speakers listed various principles that in theory govern the solidary economy: solidarity, cooperation, equality, mutuality, and self-management and also mentioned those that exist among them, union, friendship, respect, fidelity, ethics, love and freedom. They also express their knowledge of common sense and some elements in a definition of what joint responsibility economics is to them. It’s a form of organization that reduces costs, generates income and where the groups or members are responsible for the management, without exploitation or subordination” (Arcoverde 2007, 12).

In the final conclusion Ana Cristina Brito Arcoverde points out:

“Without a shadow of a doubt, the enterprises are almost joint responsibility in Pernambuco constituting alternatives in the fight against unemployment and be it for this reason or social privation in them they can meet material needs, and in consequence their social reproductions.

Certainly the first steps have been taken to break the cycle of social exclusion in search for a more equal society. They are carriers of, if not a new proposal, at least a distinct way of thinking, organize and socialize the production, work and distribute the profits of capitalism” (2007, 13).

To what extent are these initiatives and projects, that combat unemployment and poverty, transitive ones? It means that they facilitate only further expansion of multi-national capital. In how far are they able to mobilize an anti-capitalistic potential and to create “Mixed Economy” as a co-existence of capitalistic and non-capitalistic modes of “production” (Nitsch 2006). In how far is it an illusion and in how far is it reality? This is a debate going on between supporters of the emancipative approach and their opponents. I don't intend to go much deeper. I would like to make one final conclusion: Indeed, we are in process of searching for evidence and arguments supporting one or the other views, and more generally, those that regard the whole debate about the future of social economy in a modern world.

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CIVIL SOCIETIES AND FAITH COMMUNITIES: LESSONS FROM AMERICAN EXPERIENCES OF FAITH-BASED AND COMMUNITY INITIATIVES

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Abstract:

Religion is likely to remain a key factor in fighting against social ills to move toward global civil societies. Although global civil societies have continued a steady course toward secularization in the past centuries (Taylor, 2007), the influence of religion has never been lost in the post-modern world, as clearly shown in 2007 surveys on the linkage between presidential elections and religious affiliations of American and Korean voters [PFRPL (a) & PFRPL (b), 2007]. As religion remains an influential force in civil societies, effective social work interventions at the global level require an examination of the faith factor in pursuing international social development.

The purpose of this article is to highlight the inseparable linkage between civil societies' goals for improving the state welfare system and faith communities' roles in delivering social services. First, the author describes global trends toward a collaboration between faith-based and secular development organizations. Then, the paper focuses on how the recent American public policy has dealt with the challenge of the age-old dilemma of "the church-state separation" (Danforth, 2006; Feldman, 2005; Wallis, 2006) in achieving the civil society's mandate for caring for the marginalized groups of population in a largely secular country.

Despite civil societies' longstanding history of keeping distance between secular development initiatives and faith-based institutions' community projects, the efforts at narrowing the gaps between international development agencies and faith communities have been intensified since 2000 through recent global initiatives such as the World Faiths Development Dialogue and the World Wildlife Fund and Faiths meeting (Marshall, 2001). The gaps between secular development organizations and faith-based civic entities have slowly been narrowed through various partnerships between faith-based and secular institutions, based on their mutual trust and common visions for creating civil societies that can meet the challenges of global poverty and regional development issues (Marshall, 2004; Marshall & Keough, 2004; Marshall & Keough, 2005; Marshall & Marsh, 2003).

The American tradition of caring for the poor and the less privileged has been kept by diverse faith communities throughout its history. During the last decade, despite concerns over the risks in fostering a closer partnership between the state and faith communities, the American public policy took a more radical step to correct social ills by encouraging faith-based community organizations' increased roles in the delivery of social services. The 1996 Personal Responsibility and Work Opportunity Reconciliation

Act included a “Charitable Choice” provision to ease faith-based organizations’ access to federal funds like Community Services Block Grants. With the establishment of the White House Office of Faith-based and Community Initiatives (FBCI) in 2001, the separation between the state and the church has become even more a thorny issue, while the American government sought the development of various types of faith-based welfare programs (Browning, 2006; Burnside, 2005; Morehead, 2003; Olasky, 2000; Wallis, 2001). The recent evaluations of the effectiveness of the American FBCI policy (Owens, 2007; Wineburg, 2007; Wuthnow, 2004) show that the ideological compromise resulted in strenuous but progressive ties between politics, social services, and religion. The author concludes that the American experiments of the partnership between faith communities and the public sector has serious implications for international development organizations’ effective collaborations with diverse faith communities.

Keywords: Faith-Based Community Development; Religion and Social Development; Religious Communities in Social Service Delivery; Church and the State

Religion as a social institution has been an important part of integrated social systems, interacting closely with educational, political, family, and health systems. Although the Western world has continued its steady course towards secularization in past centuries, the influence of religion has never been lost in the post-modern world (Taylor, 2007). Religion is likely to remain a key factor for civil societies to fight many social ills such as poverty, illiteracy, poor health, injustice, and so on. Even in this technologically interwoven contemporary world, the inseparable linkages between the spiritual forces of religion and human needs for materialistic development have not weakened in local and global communities. Rather, in the last few decades, spirituality or the faith factor, as called by some social scientists, has been increasingly expected to be a critical force for advancing progresses in civil societies.

Civic and political leaders’ social responsibility and commitment to social well-being are often rooted in their religious convictions. Also, the public’s religious ethics and values tend to guide the policy-making process in terms of clarifying policy goals as the manifestation of what’s valued in civil society. Thus, what are significant in religious or spiritual senses necessarily become political matters either directly or more implicitly. Religious beliefs and spiritually-inspired goals of social leaders and policy-makers in the world have influenced not only domestic public policy but also the directions of foreign policy by galvanizing social and political controversies leading to peaceful or conflicting international relationships. The freedom of religion and the separation

between church and the state have always been important themes in American politics. At the same time, religious groups, particularly, fundamentalist and evangelical Christian leaders often played central roles in determining public policy directions. American Civil War and, later, American involvement in World War II and the Vietnam War were influenced by evangelical and fundamentalist religious beliefs combined with racism, desire for protecting the freedom of religion, or the fear of communism. More recently, bringing Christian principles to mainstream institutions like academia, the media, the government, and the business sector, the evangelical elite emerged as a powerful group in all aspects of American life (Lindsay, 2007). Despite the fact that the “religious right” who are fundamentalists, does not represent the majority religious groups in U.S.A., the “Christian right” and evangelicals have exercised more influences than other less determined religious groups not only in forming the characteristics of domestic public policy but also in guiding U.S. foreign policy.

This paper examines the role of religion in the contemporary world faced with many challenges that cannot be met effectively through secular interventions only. A part of the paper focuses on the relationship between two key contributors for fighting global socioeconomic problems-- secular non-governmental organizations (NGOs) and non-governmental faith-based organizations (FBOs) engaged in global community development. The author describes increasing global trends toward collaborative relationships between secular NGOs and FBOs working in the field of international development. The paper also provides an overview of the American experiences in balancing the relationships between church and the state by examining its recent changes in social welfare policies. The purpose of this article is to highlight the role of religion and the function of faith communities in community building for advancing civil societies’ goals of improving social well-being. The author highlights FBOs’ social service provider roles and showcases the experiences of the recent American public policy that aimed to expand the role of religion in the social service delivery system. From the American experiences, the author draws lessons for reinforcing global level partnerships for international development. The author also identifies implications for the social work profession to develop stronger relationships with FBOs for the purpose of promoting local and international partnerships that involve all three key players in

civil societies-- the public sector, faith-based communities, and secular NGOs.

The Role of Religion in Global Civil Society

Global civil society may be conceptualized as a *political space* (Hall, 2000) or a *space of shared information* (Comor, 2001) where various types of social movement organizations, advocacy networks, international and non-governmental organizations, and intergovernmental bodies interact with one another, thus forming a transformative global space for collaboration aided by transnational communication technologies. For realizing the ideal goals of global civil society, not only secular international organizations (for example, the World Bank, the International Monetary Fund, and various United Nations organizations) but also religiously-motivated development organizations (for example, Catholic Charities USA, International Orthodox Christian Charities, World Vision, and so on) have contributed significantly. Although religion has often been a root cause of man-made disasters and regional conflicts, on the positive side, religion has inspired human spirit to advance toward a more humane and civil social structures. The construction of modern welfare systems during the last century and the emergence of social work as a new profession beginning the early 20th century are just two examples showing the impact of religion in civil societies. Faith-inspired development organizations differ markedly from secular organizations in that they can aim to reflect spiritual principles and unifying global consciousness in the vision of global civil society (Doe, 2004a). Socioeconomic development projects tend to be guided by spiritual vision and cultural traditions of local faith communities are more likely to be respected in faith-driven development projects than in technology centered community building initiatives. Many local communities in various parts of the world have experienced faith-sensitive development projects in which spirituality and social services were closely linked and the regenerative power of religion was not underestimated by development professionals (Marshall & Saanen, 2007).

Unfortunately, however, religion has also been the source of numerous civil and global conflicts throughout the world's history. Many large scale man-made disasters can be explained by religion's downside that has frequently divided nations, ethnic groups, and tribes along the line of conflicting religious belief systems. Religion as the acronym of oppressive power as seen in the medieval dark ages continues to exercise its destructive forces in troubled pockets of the contemporary world. In the world where religious rivalry is strong and the diversity of religion is not accepted or valued universally by different religious groups, violence and atrocity committed in the name of religion have been witnessed in many regions. Images of cruel mistreatments against religious minorities by dominant faith communities have been frequently transmitted through the world's media. Pakistan, Serbia, and Sudan are just a few examples of countries that have been subject to the woes of religious conflicts. As a result, despite many contributions of religion in global civil society, the international development organizations traditionally maintained distance from sectarian NGOs supported by faith communities. As negative images of religion in global affairs have been projected widely through the media coverage, technically-oriented secular NGOs' mistrust toward FBOs could hardly be diminished. Historically, although the two types of world organizations have shared the same fields of development work, the organizational and programmatic links have been very weak to develop collaborative relationships between the two separate institutions of FBOs and secular NGOs.

The World Bank's dialogues with faith-inspired world leaders began in 1998 to establish partnerships with faith-based communities. Systematic efforts at narrowing the gaps between international development agencies and faith communities have been intensified since 2000 through recent global initiatives such as the World Faiths Development Dialogue and the World Wildlife Fund and Faiths meeting. As a result, in recent years, FBOs are increasingly seen to play prominent roles as a critical partner in advancing global civil society ideals (Marshall, 2001). Secular development organizations including the World Bank began recognizing the contributions that FBOs can make in advancing development agenda and in improving the sustainability of development projects at the local community level (Marshall, 2005). The gaps between secular development organizations and faith-based civic entities have slowly been narrowed through various partnerships based on

their growing mutual trust and common visions for challenging global poverty and regional development issues (Marshall, 2004; Marshall, 2005; Marshall & Keough, 2004; Marshall & Keough, 2005; Marshall & Marsh, 2003). The Millennium Development Project addressing global poverty issues is a good example in which common areas of concern were shared by secular NGOs and faith-based development initiatives. The 2000 United Nation Millennium Summit addressed the roles of faith leaders in transforming the world. The need for inter-religious dialogue and collaboration intensified after September 11, 2001 and the Millennium Development Goals were set for the global community to reduce poverty and other problems in the world by 2015 (Marshall, 2005).

Ethical challenges for moving toward global civil societies are shared by both secular and faith-based initiatives for fighting structural socioeconomic problems. Various partnerships between secular and sectarian organizations can be built on their common visions for advancing civil societies. Based on the common aspiration for a better world with minimized social ills, people of various faith traditions and development-focused professionals can and should work more collaboratively by enhancing mutual trust and understanding (Marshall, 2004). Both secular perspectives and religious views are needed to collaborate on the issues of poverty and equity, fairness and justice, and to develop new kinds of multi-dimensional partnerships. Strengths of traditional religious communities (for example, spiritual values and ethical principles put into social action and services) and the assets of modern development agencies (for example, technology, financial resources, professional manpower, etc.) need to be combined to cause synergistic effects for moving toward global civil societies.

Faith-Based Social Services and the Expansion of Religion's Roles in the U.S.A.

Separation between church and the state has been a valued principle in the American political system that was intended to bar undue influences from powerful religious groups in determining the directions of domestic and foreign policies. Nevertheless, the force of religion in the domain of American politics has been strong in shaping public policies that cannot be made in a vacuum of ethics and values. The public's religiosity has impacted voting behaviors and the civic groups backed by

religious organizations have often exercised powerful influences in the policy-making process. The influence of religion in American politics has not diminished as shown in a 2007 survey on the linkage between presidential elections and religious affiliations of voters. For example, the voting patterns in the USA showed that more observant churchgoers strongly favored more conservative politicians compared to less religious voters (The Pew Forum on Religion & Public Life, 2007). In fact, compared with other demographic variables such as gender, age, income, religiosity measured by church attendance was a significantly more important determinant in U.S. presidential election behaviors. The “church attendance gap” was clearly reflected in political partisanship in America (Pew Research Center, 2005).

Religious affiliations of the U.S. population are very diverse and fluid. As revealed in the 2007 U.S. Religious Landscape Survey (The Pew Forum on Religion & Public Life, 2008), the Protestant population is 51%, while the rest of the American adults aged 18 or above are affiliated with a variety of religion including Judaism, Buddhism, Muslim, and other world religions. Religious rights and the freedom of religion has been the trademark of American identity. So-called American exceptionalism (or the perception of arrogance) may be partly rooted in the sense of superiority that America is better than other countries in terms of protecting the fundamental rights for religious freedom. Following the tradition of taking religion seriously, eight out of ten Americans believe that religion is a positive force in the world, although a majority of them also saw religion’s significant role in wars and regional conflicts (The Pew Forum on Religion & Public Life, 2002). The American tradition of caring for the poor and the less privileged has been kept by diverse faith communities throughout its history. Following the Judeo-Christian tradition of caring for the vulnerable groups of the population, diverse Protestant and other faith communities in USA have been actively engaged in the delivery of social services in the private sector throughout its history that was marked with many progressive social movements such as the Social Gospel, Charity Organization Society, and Settlement House movements.

Religion is an important criterion in forming civic relationships. People tend to use religion for constructing civic identity and for determining the nature of relationships with others (Lichterman, 2008). When religion is used for forming more inclusive and constructive

relationships with others, religious or spiritual people often translate their faith or spirituality into services for others. As shown in a study of volunteers for FBOs, people of faith tend to be motivated to serve their fellow citizens out of religious or spiritual motives (Belcher & DeForge, 2007). More recently, the public's attention to the role of religion and church volunteers intensified even further as a result of the Hurricane Katrina disaster that led to Americans' wide recognition of FBOs for their efficient response to the emergency needs of disaster victims (Lawton, 2006; Smith, 2006). Indeed, it may be maintained that American religion armed with voluntary manpower is fostering civil society by demonstrating faith-inspired caring capacity for helping the disadvantaged families and communities (Chaves, 2004; Chaves & Tsitsos, 2001; Wuthnow, 2004). Overall, it is estimated that between 85-92 percent of the U.S. congregations are engaged in at least one type of community service program and congregations spend approximately \$36 billion annually for various social services including day-care programs housed in religious buildings (As quoted in Sherman, 2003, p. 20). Black churches, compared to White churches, appear to provide even more faith-based services for African-American communities with little linkages with the formal service system (Blank, 2002).

American public policy-makers' interest in expanding the role of religion in the social service delivery system in recent decades is traced to the 1980s when the public became weary of the public welfare system because of the worsening of social problems in many disadvantaged communities. Hard-to-reach social ills commonly found in inner city communities such as drug abuse, crime, teen pregnancy, school dropout, and intergenerational poverty could not be cured effectively by conventional social service agencies using professional and secular methods of intervention. With re-examination of the cause of poverty in relation to the structure of the welfare system, the methods of serving the poor were questioned during the Reagan administration. The prevailing assumption was that the public sector needed innovative ideas and transformational energy from the private sector, particularly from religiously-inspired FBOs. The FBOs were thought to have uniquely powerful ways to connect the hard-core poor beset with many challenging problems that could not be solved by the existing social service system. As a response to growing dissatisfaction about the failing welfare system, the spirit of volunteerism and faith-based approaches to

solving intractable social ills were seen as a more effective method of attacking many community problems that the government-funded War on Poverty that began in the 1960s could not solve. Since the 1980s, with a greater policy emphasis on privatization and government budget cuts, the private sector and FBOs have been expected to contribute more in the social welfare system. As a result, during the two Republican administrations led by Presidents Reagan and Bush, Catholic Charities alone had a 700 percent increase in the number of volunteers mobilized for delivering social services (as quoted in Wineburg, 2007, p. 136). During the 1980s, driven by the ideologies of Reaganomics (i.e. supply side economic policy supported primarily by Republicans) and New Federalism (i.e. empowerment of state governments' authority and responsibility as opposed to federal government's power), budget cuts for public welfare programs resulted, while policy-makers' expectations grew for the FBOs to expand their roles in caring for the needy. Conservative policy measures like the devolution and the privatization of social services facilitated increased roles of religious organizations as key social service providers (Cnaan, 1997; Dionne & DiIulio, 2000; Hodge, 1998). Even from liberal perspectives, the public welfare system was seen as a moral failure and welfare reform law, the 1996 Personal Responsibility and Work Opportunity Reconciliation Act, was signed by President Clinton, a Democrat, who wanted to initiate a new way of helping the poor get out of poverty with the assistance from FBOs (Clinton, 2006). This 1996 welfare reform legislation laid a foundation for the Bush administration to initiate public policy changes for expanding the role of FBOs even further.

Charitable Choice Provisions

The First Amendment to the U.S. Constitution reads that "*Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof...*" Based on a narrow interpretation of this constitutional requirement, prior to public policy changes in the 1990s, the major FBOs in the American social service system acted essentially as secular service providers. Agencies such as Jewish Family Services, Catholic Services, Lutheran Family Services operated as, de facto, secular agencies for all practical purposes. Compared with other non-profit secular private agencies, FBOs did not differ significantly in terms of hiring practices, secular atmosphere and intervention methods in

the agency, accounting requirements for reporting to the government, and so on. The condition of receiving the public dollars was to eliminate religious characteristics in FBOs' daily operation of the program such as removing cross in the agency building, not discriminating non-believers in hiring the agency staff, and so on.

As an alternative to a narrow interpretation of the church-state separation principle, it may be argued that the dilemma of the principle may be resolved by permitting symbolic inclusion of religion in civic arena without directly linking religious values to politics or completely barring religious influences in politics (Feldman, 2005). The Charitable Choice provisions in the 1996 Personal Responsibility and Work Opportunity Reconciliation Act (P.L. 104-193) can be seen as such efforts to solve the church-state separation dilemma. The term, Charitable Choice, refers to several laws that were enacted between 1996 and 2000 while President Clinton implemented his welfare reform measures, following the 1996 welfare reform act. The term Charitable Choice is defined as "A set of provisions in law intended to ensure that religious organizations can apply to participate in federally funded social services programs on the same basis as any other nongovernmental provider and can provide services pursuant to such programs without abandoning their religious character or infringing on the religious freedom of recipients" (Congressional Digest, 2002, p.36).

The private sector's secularized arms of religious organizations engaged in the social service delivery have long depended on public funds prior to the 1996 welfare reform. From the point of view of conservative and liberal politicians who were critical of the existing welfare system, faith-based social services appeared to be more effective, compared to secular social service programs operated by "godless, uncaring, bureaucratic caseworker" (Cnaan & Boddie, 2006, p.8). In the eyes of advocates for faith-based interventions, FBOs seemed to be achieving excellent outcomes particularly in the areas of job skills training, child care program for low income families, prevention of prison re-entry, mentoring for welfare-to-work participants, job placement services, and so on. Within the rising culture of conservative political economy, many politicians from both Democratic and Republican Parties were willing to take new policy initiatives for attacking hard-core social problems that could not be tackled effectively by secular social service organizations. As a result, during the last decade, despite some adamant

opponents' concerns over the risks in fostering a closer partnership between the state and faith communities, the American public policy took a more radical step to correct social ills by encouraging FBOs' increased roles in the delivery of social services.

In order to protect the constitutionality of the Charitable Choice provision, the Community Solutions Act of 2001 (i.e. Charitable Choice Act) aimed to protect the religious character of FBOs, while protecting the religious freedom of the recipients of social services. While FBOs were allowed to preserve religious environment in their facilities where social services were provided, it was clearly prohibited for them to use federal funds for inherently religious activities such as worship, religious instruction, or proselytizing. Under the Charitable Choice provision, new policy measures were allowed to encourage more faith-based community programs to apply for the public funds by removing unnecessary bureaucratic barriers. In particular, small FBOs in low income neighborhoods have been encouraged to develop partnerships with the public sector in order to utilize various public funds like Community Services Block Grants (The Roundtable on Religion & Social Welfare Policy, 2006). With the Charitable Choice provision, the FBOs were allowed to display religious symbols & other religious objects in service facilities; use intervention approaches that emphasized religious characteristics and values; and use religious criteria in employing staff while receiving public funds. On the other hand, public welfare agencies were required to provide alternative non-faith-based service programs that are easily accessed so as not to discourage service utilizations by clients not interested in FBOs' services. In addition, the rights of recipients were protected by assuring that they could not be denied services for religious reasons and could not be required to participate in worship and/or religious education activities as a part of the services being offered.

A summary of the original assumptions, risks, and opportunities debated by the proponents and critics of the Charitable Choice laws are presented in Table 1.

Table 1

The Assumptions, Risks, and Opportunities of the U.S. Charitable Choice laws

Assumptions	Risks	Opportunities
<p>Faith-based social service organizations face substantial discrimination in competing for public funds.</p> <p>Religious congregations are intensely involved in social service activity.</p> <p>FBOs are more effective at delivering social services than secular organizations.</p> <p>FBOs deliver social services in a more holistic and personal way, focusing on individual clients' deep personal transformation.</p> <p>Much faith-based social service activity is isolated from the secular and government-funded social services.</p>	<p>FBOs' poor fiscal accountability & potential misuse of tax dollars.</p> <p>Lack of oversight for protecting clients' rights & preventing client abuse.</p> <p>The religious exemption in Title VII of the Civil Rights Act of 1964 (i.e. use of religious criteria in employment practices)</p> <p>Clients' right to secular services may be jeopardized by compromising the church-state separation principle.</p> <p>Declined quality in secular/non-Christian programs due to reduced funding to non-FBOs.</p> <p>Dominant religious groups' cultural, political, religious pressures & discrimination against clients of minority religions (e.g. The Native American church, Islam).</p>	<p>Benefits for ethnic minority (e.g. Black churches with high enthusiasm for seeking government funds.)</p> <p>Economic conservatives advocate for the privatization & localization of the social service delivery system.</p> <p>The faith factor in services delivered by faith communities will improve service program outcomes.</p> <p>More opportunities for transforming individuals & reforming communities using public funds.</p> <p>Community-based, grassroots FBOs can fight poverty effectively through more personal & spiritual interventions.</p> <p>The Charitable Choice provision is an avenue for practicing religious pluralism & for protecting</p>

<p>The new faith-based initiative is likely to involve new kinds of religious organizations in publicly funded social services.</p> <p>There exists ecumenical fairness in the social service delivery system.</p>	<p>Funding inequity between dominant Christian groups and minority faith groups.</p> <p>Religious favoritism for major Christian FBOs.</p> <p>Spiritual quality of FBOs may be sacrificed in securing the public funds.</p>	<p>religious freedom of clients and the service providers.</p> <p>Minority churches can compete with mainline faith groups in securing public funds.</p>
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Source: Compiled from various reference materials cited in this paper including the website at <http://www.whitehouse.gov/government/fbci/guidance/charitable.html#1>.

The White-House Faith-Based and Community Initiatives

With the establishment of the White House Office of Faith-based and Community Initiatives (FBCI) in 2001, the separation between church and the state has become even more a controversial issue, while the American government pursued expanded supports for various types of faith-based welfare programs (Browning, 2006; Burnside, 2005; Morehead, 2003; Olasky, 2000; Wallis, 2001). The implementation of the White House Office’s FBCI projects for expanding partnerships with FBOs would not have been possible without receiving bipartisan supports from legislators. Despite the debates surrounding the dilemma of church-state separation (Danforth 2006; Feldman, 2005; Wallis, 2006), the Charity Aid, Recovery and Empowerment (CARE) Act of 2002 received bipartisan supports from both Republican and Democratic senators like Orrin Hatch and Hillary Rodham Clinton. Although the FBCI began with little empirical evidence on the effectiveness of faith-based approaches to social and economic problems, with rigorous nonpartisan supports, FBOs were expected to play greater roles in the American social service delivery system (Cnaan & Boddie, 2006; Greenberg, 2000; Thiemann, Herring, & Perabo, 2000). Despite concerns over the risks involved in the partnership between the government and faith communities and the lack of clear evidence on the efficacy of FBOs, the American public, in

general, also appeared to have high expectations on faith-based approaches to correcting social ills.

The 1996 welfare reform provided a sound platform for the formation of more conservative public policies that readily incorporated individualistic faith principles in the provision of federally funded social services. With the new Charitable Choice provision made under the 1996 welfare reform, public funding structures were changed to allow the eligibility of FBOs that retained some religious characteristics in applying for governments funds for social service programs. Centers for Faith-Based and Community Initiatives housed under federal government offices such as the U.S. Departments of Labor, Education, Health & Human Services, and Urban Development, Justice were charged to treat FBOs as eligible social service providers without discriminating them based on their religious characteristics. Modeling after the 1996 welfare law, related Charitable Choice provisions were reflected in 1997 Temporary Assistance for Needy Families and the welfare-to-work grant program, 1998 Community Services Block Grant Program; 2000 Titles V & XIX of the Public Health Services Act (i.e. Block grant and discretionary grant for substance abuse treatment & prevention services), and so on. Since 2001, the allocation of more public funds for faith-based programs was promoted by encouraging more active participation of FBOs. The goals of the 2002 CARE Act known as a bill for promoting charitable giving intended to allow a charitable giving deduction to individuals, permit tax free distributions from Individualized Retirement Accounts (IRA) for charitable purposes, increases the cap on corporate charitable contributions, and provide financial support for nongovernmental community-based organizations for grant writing, legal, program development, and so on.

Since the establishment of the White House Office of FBCI in 2001, the Bush administration issued a series of Executive Orders that required equal protection for FBOs and created eleven Centers for FBCI housed under various federal departments. With the establishment of the Compassion Capital Fund (CCF), the signature initiative of the White House FBCI, over \$260 million was provided through the CCF alone to more than 4,500 FBOs (U.S. Department of Health & Human Services, 2007). By 2006, all 50 states received FBCI federal funds, including 35 states and over 100 cities that established liaisons or offices for implementing FBCI-funded projects. The fiscal year 2006 data showed

that more than 15,000 secular nonprofit organizations received \$12.56 billion while \$2.18 billion were provided to over 3,000 FBOs through competitive grant award processes. This shows a dramatic increase (i.e. 41% between 2003 and 2006) in the FBOs' participation in seeking federal funds (The White House, February 2008). The FBCI program areas included welfare assistance, workforce development, housing, healthy marriage and relationships, health, substance abuse, prisoner re-entry, disaster relief, youth education, and mentoring. Building on many accomplishments and the principle of equal treatment regulations implemented for the last seven years to protect the religious character of FBOs, President Bush called for a permanent extension of Charitable Choice Act in 2008 in his State of the Union address (The White House, Spring 2008). As predicted by the former director of the White House Office of FBCI, regardless of the permanence of the Charitable Choice legislation, it is likely that the enlarged participation of FBOs in the government-financed social delivery system will continue to grow in the future even after the end of the Bush administration (Cnaan & Boddie, 2006; Wilhelm, 2006).

Evaluation of FBCI Programs

In the U.S.A., the ideological, social, and economic ties between politics, social service, and religion have been reinforced through the experimental partnership between faith communities and the public sector for implementing the 1996 welfare reform law (Wineburg, 2007). The experimental partnerships with FBOs were not based on sound empirical evidence on the positive role that the faith factor played in solving social ills in disadvantaged American communities. In fact, the most comprehensive review of studies on the faith factor conducted in 2002 by the Center for Research on Religion and Urban Civil Society revealed only "objective hope," at best, that FBOs can contribute positively as significant providers of social services compared to secular agencies. The Center's systematic review of 800 studies mainly showed positive impacts of religious commitments on emotional, social, and health outcomes. Only 25 of studies analyzed in the comprehensive review focused specifically on the effectiveness of FBOs, resulting in little empirical evidence that FBOs were more effective than secular social service agencies (Johnson, Tompkins, & Webb, 2002). At best, very basic and preliminary study outcomes were revealed in support of faith-based

programs in dispensing public funds for combating social ills. The comprehensive review of earlier studies by Johnson, Tompkins, & Webb (2002) that examined the effectiveness of services provided by FBOs prior to the implementation of the FBCI policy revealed many methodological weaknesses in the design of evaluation studies. For example, none of the earlier studies employed a classical experimental design or used a nationally representative sample in the study and the top-down FBCI implementation lacked thorough planning for designing more scientific evaluation studies (Wineburg, 2007).

Other studies including some more recent evaluations of the effectiveness of the American FBCI policy also failed to show strongly supportive empirical evidence about the positive role of the faith factor in explaining the differences between faith-based programs and secular programs (Chaves, 2004; Owens, 2007; Wineburg, 2007; Wuthnow, 2004). A recent review of empirical studies that focused on the effectiveness of spiritual interventions in substance abuse treatment and prevention did not show that spiritual interventions were more effective than other traditional methods (Stoltzfus, 2007). Another study that examined partnerships between public health departments and faith communities in a single state showed that partnerships with FBOs were no more likely to be effective than other partnerships that did not include FBOs (Zahner, 2004). In the absence of clearly convincing empirical evidence, from a cynical point of view, the FBCI may be seen as a mere “cultural crusade to send sinners back to church” (Wineburg, 2007, p.12) that was supported by white Evangelicals with hidden political and ideological agenda. If one were to take a more positive perspective, however, it appears that that the ideological compromise between the opponents and the supporters of Charitable Choice provisions resulted in strenuous but progressive ties between politics, social services, and religion. The increased partnerships between the government and FBOs, however, still lack supportive empirical evidence showing the clear role of the faith factor of faith-based social services (Furstenberg, 2006).

It is not that no positive outcomes were found showing the effectiveness of FBOs compared to non-FBOs. Interestingly, faith-based rehabilitation programs for preventing prison re-entry showed consistently positive outcomes. As reviewed by Sherman (2003), empirical studies on the effect of the faith factor on the recidivism of ex-offenders consistently yielded positive results for the participants of

Prison Fellowship programs replicated in different parts of the country. However, unless the evaluator accepts the reality of compromised rigor of the evaluation methods used in previous studies, one cannot argue that it is the faith factor in faith-based programs that explains the high performance of some faith-based programs that appeared to be more effective than secular programs. The difficulty in finding empirical evidence relates to the difficulties of using equivalent control group pre- and post-test research designs. The methodological weakness in designing program evaluation studies may be attributed to the lack of planning and local community level groundwork that needed to be done prior to the implementation of FBCI programs (Wineburg, 2007). It also needs to be noted that 50 states operate federal policies differently, depending on varying political cultures that may be broadly categorized into moralistic, individualistic, and traditionalistic state cultures (Mead, 2004). Bielefeld's study (2006) showed unstable service delivery systems at state and local levels, which created methodological problems in comparing the program effectiveness of FBOs with non-FBOs. Because of diversity of policy at state and local levels and wide variances and frequent changes in the implementation of Charitable Choice policies, it is difficult to carry out meaningful comparisons across states and between programs (Bielefeld, 2006). Although "some highly-tentative suggestions that client attitudes and behaviors could be influenced by FBOs" (Bielefeld, p. 171), no conclusive evidence was revealed in an evaluation of FBCI programs in three states. In addition, there are other challenges in conducting scientific evaluation of FBCI programs. First, the lack of adequate funding for doing program evaluation has been the norm. Without allocating extra funding for data collection, the use of existing staff for data collection poses more burdens to the agency operation. It is difficult to conduct longitudinal studies even within a state because of frequent policy changes at state, county, and local government levels. Despite all these challenges in doing more rigorous evaluations, continued efforts are being made to find more empirical evidence through program evaluations. In June 2008, about 25 outcome-based evaluations of FBCI pilot programs are scheduled to be reported at the FBCI National Conference on Research, Outcomes & Evaluations in Washington, D.C.

In short, "it seems safe to suggest that faith-based organizations as a whole are neither superior nor inferior to their secular counterparts" although no authoritative conclusions can be made based on all

evaluation studies done so far (Boddie & Cnaan, 2006, p. 287). The tangible benefits of allowing more FBOs' participation in social service system may be found in other areas than in higher programmatic effectiveness compared to non-FBO programs. Overall, the advantages of having more FBOs in the social service delivery system as equal partners with secular agencies are not insignificant. FBOs are usually better informed about the clientele and their unique needs. The program costs can be lowered with the use of donated church space, volunteers, and less credentialed staff with lower salary expectations. Also, the clients may have more contact time with frontline workers who are often volunteers and less bureaucratic and more caring and personal. With more FBOs in the social service delivery system, non-faith-based service providers face more competition for providing cost-effective programs. Even when the program costs are not seen as the most important criterion for evaluating the effectiveness of services delivered by FBOs, the overall social service system may benefit from the pressure of higher competition coming from the added numbers of service providers.

At the agency level, it seems unclear how the faith factor gets implemented. Evaluation of faith-based programs cannot be done meaningfully without defining the meaning of the faith factor at local community and agency levels. Future studies need to focus on the meaning of the faith factor at the service delivery level, taking the perspective of the clients served instead of using the evaluation criteria deemed important from the service provider's point of view. The questions that need to be answered in future studies include: Are there clearly written policy guidelines to ensure that the faith factor does not get compromised in the service delivery process in the agency setting?; How does the faith factor influence individual interactions between the FBO's staff and a client of other religions?, and so on. Future studies also need to take a systems approach that includes community networks and partnerships of various stakeholders in the local community (Campbell & Glunt, 2006).

Religious Pluralism and Social Work Roles for Promoting Partnerships with FBOs

Partly because of the world's many conflicts rooted in religious absolutism or extremist approaches, religion has been the target of suspicion and misunderstanding among many social workers. Between-group and within-group discriminations against people of minority faiths also led to the lack of trust of religion among non-sectarian professionals (Hodge, 2007). In this regard, open-mindedness among religious groups is an essential ingredient for global faith communities to work in collaborative relationships with secular professionals. The good news for the humanity that came out of the September 11 bombing of the World Trade Center in U.S.A. is that a new level of awakening occurred in global communities, particularly among the American public. A sheer necessity for making some sense out of the unthinkable act of violence committed in the name of religion led to many local and national inter-faith discussion groups and public forums throughout America. Inter-religious dialogues that intensified since the tragedy of September 11 seems to have brought about much desired transcendent unity of diverse world religions (The Pew Forum on Religion & Public Life, December 2001). An example of newly gained understanding is the realization that poverty and terrorism were not unrelated and poverty in the world can act as a recipe for mixing irrational terrorism with religious fanaticism. Citizens of countries with less resource for development suffer more from such problems as unemployment, poor education, and lack of socioeconomic opportunities. The feelings of injustice and anger felt by people in less developed countries may lead to extremist religious perspectives fueled by hopelessness and despair. Regardless of whether this socioeconomic explanation of religious fanaticism is acceptable or not, what is clear is that the September 11 disaster caused people of different religions to think differently and learn to value and appreciate the true spiritual essence of diverse religions. When the divisive nature is overcome and the spiritual commonality among world religions is mobilized for facilitating mutual understanding, religion can be a force for world peace (Johnston, 2003; Johnston & Sampson, 1994). As the humanity outgrows the medieval mantra of religious absolutism and ecclesiastic egotism, globally unifying spiritual consciousness drawn from world religions is likely to form universalistic spiritual principles that will help the humanity to move toward global civil society (Doe,

2004a).

Social work's partnerships with international development organizations and local FBOs can grow in the future based on the commonality of shared concerns and aspirations for building a better world. Despite the weakness of religion manifested throughout the history of human civilization, the ideological links between religion, social work, and the field of community development are found in the common goals shared by religious social leaders and secular professionals. It needs to be reminded that, historically, the social work profession stemmed from religious roots and proto-social workers in the late 19th and the early 20th centuries in America collaborated closely with like-minded religious leaders who were also engaged in progressive social movements for better serving the needy and the vulnerable. As a result of professionalism that paralleled the secularization of the profession, social work's religious roots have been weakened during the last century. The gaps between faith-based approaches and more scientific approaches in assisting vulnerable populations have grown during the course of professionalization. However, since the formation of the Society for Spirituality and Social Work in 1989, some American social work researchers began examining the relevance of spirituality and religion in professional social work. The existing body of social work literature suggests that effective social work intervention often requires the inclusion of the spiritual and religious aspects of the client system in meeting multi-dimensional clients' needs (Bullis, 1996; Canda, 1998; Canda & Furman, 1999). Although an emerging body of literature on spiritual and religious issues has accumulated during the last two decades, the linkages between spirituality and macro social work at the organizational level have rarely been examined (Doe, 2004b). Even in the face of growing partnerships between faith communities and the public sector, the social work profession has pretty much ignored the role of FBOs as a key actor in civil society. Contemporary social workers largely remain aloof about issues relating to religion or faith-based social services. For example, even though the professional ethics dictate social work's obligations for advancing social justice, little efforts have been made by social work practitioners to fight against religious discrimination in the world (Hodge, 2007). Despite the historical and contemporary significance of religious organizations in the provision of social services, social work educators have paid little attention to FBOs' contributions

(Cnaan, 1999; Netting, Thibault, & Ellor, 1990). In particular, within the domain of macro social work, the faith factor in the American social service system has rarely been studied and social work's systematic collaborations with FBOs on organizational and programmatic levels have barely been advocated to promote partnerships between professional social work and faith-based social services.

At the international level, partnerships are also needed between secular NGOs, FBOs, and various levels of governments in the public sector. Based on preliminary outcomes of pilot FBCI projects supported with the public fund, the U.S. government has reached out to global communities. In recent years, the U.S. federal government has been at the forefront of replicating the faith-based approach to global community building initiatives by promoting foreign governments' three-legged partnerships with local and international FBOs and non-governmental development agencies. One of the Bush administration's eleven Centers for FBCI was created under the U.S. Agency for International Development (USAID) in 2002 to provide skill-building workshops and technical training for NGOs in the U.S. and abroad. Using an innovative mechanism of collaborating with the private sector (i.e. the Global Development Alliance), under the leadership of the USAID, currently more private funds (i.e. 80% of total America's financial support) are provided to developing nations than from the American government's public fund that amounts to only 20% of the total aids (The White House, February 2008, p.16). The increased flow of private funds to the developing world promoted partnerships with indigenous faith-based and community organizations by reversing the past pattern of non-collaboration between FBOs and secular development organizations and by making local community organizations central partners for socioeconomic development. The public-private partnerships promoted through the USAID included collaborations with FBOs such as the Salvation Army Zambia, the Expanded Church Response, Catholic Relief Services, and World Vision. As recently as March 2008, the USAID's Center for FBCI sponsored a conference entitled, "public-private partnerships and economic development" to promote increased collaborations with FBOs in indigenous communities.

Prompted by the Bush administration's initiatives for enlarging religious organizations' social welfare functions, FBOs' roles in meeting human needs are likely to grow in the future. In the era of post-

modernism that ushered in the re-emergence of spirituality and renewed a fresh recognition of religion as key elements of civil societies, social workers need to re-think their professional relationships with FBOs as important social service providers. Social work roles need to be clarified in terms of helping FBOs do effective and more professional work using the FBCI funds (Cnaan & Boddie, 2002). It is no longer possible for the social work profession to ignore the necessity for partnering with FBOs to expand professional efforts at solving local and global community problems. FBOs can make invaluable contributions for supplementing local community services funded by the public sector and they can play important roles in international initiatives as experienced partners in the field of global community development. FBOs need social work's professional expertise for building organizational capacity, increasing program sustainability, and establishing outcome-based program effectiveness. For maximizing faith-based program effectiveness, social workers need to promote professional partnerships for delivering faith-based community services. In particular, social workers can make a great contribution to the empowerment of minority faith communities by playing leadership roles in advocating for minority faith community needs. Social workers can take a lead in recognizing minority faith groups' spirituality and religious traditions as culturally-specific and ethnically valuable empowerment resources. It is also necessary for social workers to become more knowledgeable about the risks and challenges in implementing faith-based programs for the benefits of religious minority groups. In facilitating effective partnerships between private and public sector agencies engaged in faith-based social services, social workers can play leadership roles in promoting minority group interest for the purpose of implementing faith-based community programs in a culturally sensitive manner. By becoming more open-minded about alternative ways of helping client systems, professional social work functions may be adjusted to foster closer relationships between the fields of secular social services and the faith-based interventions. As summarized in Table 2, social work roles in promoting FBOs' partnerships with public and private sector agencies are many.

Table 2
Social Work Roles in Promoting FBOs' Partnerships with Private/Public Sectors

Social Work Roles	Areas for Promoting Partnerships between FBOs, Private, and Public Organizations engaged in Community Development Initiatives
Advocate	<p>Takes leadership roles for facilitating private/public partnerships at local and global levels.</p> <p>Promotes the importance of spiritual diversity and pluralism in religion in U.S. and global communities.</p> <p>Promotes culturally & spiritually-sensitive service delivery system at the local and global community level.</p> <p>Advocates for clients' rights for religious/spiritual self-determination.</p> <p>Advocates for minority faith/ethnic groups' rights to compete for public and private funds.</p> <p>Engages in legislative and agency-level advocacy activities for developing minority-centered faith-based programs.</p>
Consultant	<p>Serves as an organizational consultant for forming interfaith and development coalitions for pursuing common social causes.</p> <p>Serves as a consultant for small FBOs to increase the sustainability of local faith-based programs.</p> <p>Establishes collaborative interagency networks for the local government (for example, The FBO Collaboration Council at the county or local community level).</p> <p>Incorporates strength-perspectives in developing and implementing FBOs' program activities.</p> <p>On a voluntary basis, identify a small FBO in a local community and provide professional expertise for assisting the FBO's partnership efforts geared toward local or global community building.</p>

	<p>Trains FBOs' volunteers and non-paid staff in the areas of cultural and religious sensitivity in serving clients with diverse religious or spiritual backgrounds.</p>
Liaison	<p>Serves as a social service agency's liaison that links minority faith groups' spiritual and religious strengths with external community development initiatives.</p> <p>Establishes organizational networks between faith-based communities' intangible spiritual assets with professional community's expertise for community building.</p> <p>As a third party professional, facilitates interfaith collaborations between the majority and minority faith communities and faith-based organizations.</p> <p>Organizes small groups of intra-faith and interfaith networking within FBOs and secular social service organizations.</p> <p>Expands collaborative opportunities for public-private partnerships in seeking external funds for FBOs and secular social service organizations.</p>
Program Developer	<p>Conducts spiritually-sensitive community needs assessments to incorporate diverse needs of minority clients in developing community programs.</p> <p>Provides professional expertise in designing collaborative programs that combine the strengths of FBOs and secular interventions methods.</p> <p>Expands program resources including the public funds and the private voluntary manpower by partnering with FBOs and private sector organizations.</p> <p>Develops inter-agency and interfaith program proposals in responding to local governments' funding opportunities.</p> <p>Expands program categories by working with local governments' community development office (or contract office) by sharing professional knowledge of evidence-based program effectiveness.</p>

Community Organizer	Facilitates local level collaborations for organizing faith-based community building initiatives. Nurtures leadership qualities among grassroots community members and indigenous residents of local faith communities. Encourages equal partner relationships with the indigenous beneficiaries of FBO programs in local communities.
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Conclusion

Considering the overall wealth in the contemporary world including communication technology and the means of distributing the existing resources, poverty can be eradicated and is not something that should be endured by disadvantaged groups of the world population. Poverty is not so much a problem of the lack of material resources as the lack of collective will power and collaboration strategies that help people work together in efficient partnerships. A new vision that overcomes the weakness of capitalistic political economy and social structures needs to guide global and regional efforts at combating poverty and related social ills. In advancing ideological and ethical ideals for realizing expanded justice and equality, social movements and progressive changes in public policy have often been guided by ethical and spiritual principles embedded in world religions.

Faith-based social services in U.S.A. are not new ideas, considering the origin of the contemporary social work profession that started out as voluntary services performed by well educated women and social leaders of Christian backgrounds. In the course of professionalizing helping activities during the last century, social work has distanced itself from religious influences in the areas of practice, teaching, and research. Since the formation of the Society of Spirituality and Social Work in 1989, social work research and education have advanced to include spirituality and religion in the list of research themes and social work courses. Nevertheless, the gap between FBOs and the social work profession has not narrowed significantly even in the face of public policy changes that expanded the funding mechanism for faith-based service providers. As religion remains an influential force in global communities, effective social work interventions require further

examinations of the role of religion and spirituality in pursuing the goals of civil societies.

The author concludes that, despite the practical complexities in resolving the dilemma of the church-state separation principle, the American experiences of depending on FBOs for combating social problems clearly showcase the necessity for more effective collaborations between secular NGOs, FBOs, and the public sector as key agents of civil societies. The American experiment of expanded partnerships between faith communities and the public sector has serious implications for international NGOs' effective collaborations with diverse faith communities as well as with local governments. Future efforts at advancing the ideals of civil societies are likely to require more of empirical evidence on the effectiveness of faith-based community programs and greater supports for research will be needed for conducting more rigorous evaluation studies. Given the available study outcomes, faith-based approaches may continue to be advocated for impoverished communities to tap into spiritual and religious assets as well as material resources provided by the public and private sectors. As faith-based programs are expected to continue to grow in the social service delivery system, social work educators, practitioners, and researchers need to seek new ways to promote collaborative partnerships with community-based FBOs charged with enlarged civic responsibilities for serving the vulnerable populations.

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- [3] Center for Public Justice Charitable Choice page, <http://www.cpjustice.org/charitablechoice/>
- [4] House Judiciary Committee hearings, http://commdocs.house.gov/committees/judiciary/hju72981.000/hju72981_of.htm
- [5] The Center for Religion and Civic Culture, University of Southern California, <http://www.usc.edu/crcc>
- [6] The Pew Forum on Religion & Public Life, <http://pewforum.org/>
- [7] The Program for Research on Religion and Urban Civil Society, University of Pennsylvania, http://www.sas.upenn.edu/prruc/articles_books.html
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EUROPEAN 'TRANSITION' IN THE CONTEXT OF GLOBAL CHANGE, AND THE ROLE OF RELIGION IN CIVIL SOCIETY TODAY

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Abstract:

In this paper I shall look at issues of social cohesion, social justice, pluralism and integration in the rapidly changing East End of London, and explore similarities and differences with the 'transitional' situation in Romania. I shall attempt to set this within a wider context of economic and societal change arising from market globalisation and anxiety over energy sources and global warming. I shall argue that the notion of 'transition' in post-Communist societies takes as given the assumptions of Western market-economy philosophies that *a*) create social division in 'developed' countries, *b*) raise moral concerns with regard to trade and economic relations with poor countries throughout the world, and *c*) are themselves in a state of 'transition' due to shifts in the balance of global economic power (particularly the increasing power of China and India). I shall attempt to identify the role of religion in the way these assumptions are, consciously and unconsciously, upheld or challenged; and to see how this works out in the life of individual religious communities.

Working as a parish priest and university chaplain in East London, and formerly as Anglican Chaplain in Bucharest and Sofia, I shall draw on personal experience of charity work, *diaconie*, and local community development in partnership with voluntary, state, and private sector bodies, and in ecumenical and interfaith work across religious boundaries. The role of Chaplain in an institute of Higher Education is that of "critical friend": I shall look at what it means for religious communities to be a "friend" within the secular structures of power in society, and what it means to be "critical", and shall assess the advantages and limitations of this model, with particular reference to the perspective of the socially marginalised and disadvantaged.

Finally I shall look at how, in the contemporary 'global city' of London, experience of marginalisation, injustice, and poverty is voiced through a great diversity of communities (including a large Romanian diaspora community), in which issues of identity and belonging are generating new, potentially creative, potentially explosive political, social, and spiritual movement. As these issues become more pressing, it becomes apparent that civil society itself is not a static given, but is in constant 'transition' towards the embodiment of values that have a spiritual as well as a socio-economic dimension. At this spiritual level, 'transitional' societies have an equality with, indeed sometimes a superiority over, the politically and economically more developed world. Part of the role of religious communities is to affirm and promote this axiological equality

in a debate all too generally dominated by the concern of the powerful for technological and financial self-advancement.

Keywords: transition, identity, marginalisation, values

My point of reference is East London, where I work as an Anglican priest, and I shall reflect on transition in the light of East London's "global community". In particular I argue that the discourse of 'social cohesion' needs a broader frame of values if it is to be more than a rhetoric of social containment. And if Europe as a whole is to achieve transition from a world of discrete, self-interested national entities to one of acknowledged interdependence and reciprocal valuing of different perspectives and gifts, I suggest we need a broader, holistic moral vision and more securely grounded understanding of what ultimately constitutes human identity.

East London: a World in Transition

East London exemplifies many of the changes that are currently leading countries across Europe to re-examine their values and identity. Much of what "ordinary British people" (a catch-concept of the political right) fear about the future of their society is writ large here. So in focussing on this area we can identify some of the socio-geographic forces that are exercising leverage on national and international policy-making.

East London has a plurality of ethnic, cultural, socio-economic, and interest-based communities. This makes it hard to posit a univocal "common good". Its nexus of global links - personal, familial, and business - reveals the extent to which communities today are globally networked. Its religious diversity challenges all, religious and secularist alike, to identify a basis of shared values upon which common human dignity can be affirmed. Finally, the juxtaposition of wealth and marginalisation in the redeveloped dockland area of Canary Wharf and the Olympic construction site and business development at Stratford reminds us of the inequity which it is surely one of the tasks of civil society to address.

A Sample Community

The parish of St. Barnabas, Manor Park, where I serve has astonishing ethnic and linguistic diversity, even for East London. A large proportion of its residents were not born in the UK. People have settled, or are in transit, from all over the world: a Kenyan shops at an Afghan stall, Caribbean Pentecostals share premises with an Albanian dance group, a Sri Lankan Tamil restaurant opens next to a Pakistani estate agent ... In the primary school of which I am a school governor, 96% of the children have English as a second language.

The parish church was built just over 100 years ago, when the area was first developed for housing. Its size and neo-gothic splendour symbolise the Church “by law established” to which most residents of the area were expected to adhere. Meanwhile in the neighbouring parish, hidden among packed Victorian terraces, is a medieval village church. A couple of 19th-century Non-Conformist buildings now serve as community centres, and another continues as an evangelical Christian Centre, while worshippers from South India, the Philippines, and Poland pack the 1960s Roman Catholic church at every Mass. There are three mosques, two Hindu temples, and a Sikh gurdwara. Other religious groups meet in hired rooms. In the 2001 national census the parish was 43% Muslim, 16% Hindu, 9% Sikh. Extremely few respondents described themselves as having no religion.

So-called “white flight” has combined with traditional working-class aspiration to a “better” life in suburban Essex, and the few remaining representatives of the old East Ender community are mostly well past retirement. But how stable and monochrome was the “original” community? An octogenarian described to me how as children, if they saw a black man, they would run away, “terrified”. Meanwhile Manor Park Jewish cemetery still stands as a reminder of a once large Jewish community - there is now no Jewish presence. Immigrants arrived from the Caribbean in the late ‘50s. In the ‘90s, Sikhs who had settled in Manor Park two decades before sold their houses to incoming Muslims ... Historic events and shifts impacted on the area: from this parish alone, over 200 men killed in the First World War; the trauma of the Blitz, still vividly recalled; closure of the London docks; arrival of refugees seeking asylum from post-colonial conflicts; economic migrants following EU enlargement. China and India are shaping the course of yet further change. Thus, while always an area of greater or less deprivation, and in

that sense remaining constant, Manor Park has, throughout its history, experienced almost continuous evolution.

Transition and Change

It has been convenient to attribute all the ills of Eastern Europe to “fifty years of communism”, as though the world out of which communism emerged had been a state of unproblematic normality. True, Romania (at least, some Romanians) in the 1930s enjoyed remarkable prosperity, with the *leu* at one point stronger than the French franc. And with sufficient elision of history that period could be evoked as a golden age. In fact, however, as our slice of East London’s story shows in a magnified way, evolutionary adaptation is the norm.

Transition is always from one evolving state to another, equally evolving state. Strong and weak, rich and poor, we are all in transition, let us hope, toward greater peace, equity, and harmony on this fragile planet.

Yet European transition discourse enshrines consumer market capitalism as *the* definitive politico-economic order. Other traditions, understandings, resources are of value only insofar as they service the “market”. An imaginative moral vision is at best secondary to this fixed perspective.

Transition Questioned

The transition from Soviet-style ideological prescription to dynamic entrepreneurial pragmatism is potentially for the better. Yet better for whom? As suggested, ‘transition’ can cloak an ideology - that of ‘the market’ - as rigid, theory-led and susceptible to abuse as any. For all the free-market talk of incentive, investment, and release of potential, *homo economicus* can implement these principles with self-serving ruthlessness.

A proper market is governed by laws deriving from a broad, humane, and consistent moral vision. By contrast the current market is often barely more than a forum for jungle capitalism, the Western “economic miracle” being promoted without acknowledgement of the injustices and social, ecological, and moral dis-ease seen by many, in the West as well as in poorer countries, as inherent in profit-driven development.

Theories must adapt. And adaptation, as distinct from expediency to protect existing beneficiaries, must be grounded in real values. Proclaimed values of freedom and the long-term economic good cease to command respect when they disregard the actuality of people's hopes, disappointments, frustrations, and felt humiliation. This is particularly pertinent to the European situation, as disenchantment with "the West" becomes more visible (in Russia notably) and the Western human rights agenda is compromised for trade agreements (e.g. with China) or in the politically murky "war against terror".

In evaluating transition, a few will focus simply on whether or not they are able to become immensely rich; most will look at their personal material standard of living, with reference primarily to the US; many facing insecurity, economic marginalisation and powerlessness, will decide things were better in the past; and many will also find arrogance and double-standards in the developed world and respond with cynicism, resentment, apathy or anger. Meanwhile people in the developed West will be making assessments according to their expectations of an ever high standard of living. And at every point on the continuum, whether in the developed world or in transitional countries, the feelings arising from this appraisal provide the raw material for change. The decisive issues are the same: whose views will prevail, and how? This is where a strong civil society is desirable.

Is Democracy Exciting Enough?

Without a broad-based, vigorous civil society, democratic accountability is hard to achieve and sustain. Without effective local consultation and subsidiarity, government becomes authoritarian or demagogic. A particular problem arises in long-established democracies, however, when these principles are so enshrined within "the system" that they are taken for granted. The structures are there, but cease to be properly inhabited. On the one hand they are used for self-justifying rhetoric ("We stand for freedom and human rights ..."). On the other, they lead to a conventionalisation of radical critique and a loss of appreciation of what the West has achieved at such cost.

Over recent years civil society in the UK has become "professionalised", with more centralised governance, increased paperwork, and stricter requirements for voluntary and community sector bodies. Financial reward, qualifications and presentation are valued

above experience, trust, and association. Long working days and commuting hours leave less time for other commitments. Volunteers have to take on 'political correctness', the accumulation of democratic checks and balances, the greater possibility of legal liability. All these changes have a rationale. But they lead to a certain joylessness and lack of vitality in the public sphere. Compared with the private leisure sector, civil society activities are distinctly "un-sexy".

Self-Interest & Social Cohesion

In Western market economy societies the civil sphere is popularly defined by, on the one hand this "un-sexiness" (equated with modest or no financial reward), and on the other the "sexed-up" virtues and vices of media celebrities, which overshadow serious coverage of political and social affairs.

Adam Smith's endorsement of the beneficence of self-interest (self-interestedly interpreted, of course) has become canonical. Is getting involved in the tedious business of civil society in my interest? It's only losers who'll do something for nothing ... With economic growth the overriding national imperative, the citizen's prime duty is not to be a thinking participant in public life, but to contribute to growth by increased personal consumption.

Margaret Thatcher notoriously declared, "there's no such thing as society". Since then life has been increasingly described in terms of monetarist consumer transaction (news is "consumed", travelling by train one is a "customer" not a passenger, we "buy into" an idea ...). Depersonalising designation turns human beings into economic factors. Capitalist individualism has constructed a system not dissimilar to that from which Eastern Europe is in transition - a system in which everyone at every level is somehow "constrained" by their position, and, as long as a lawyer can persuade a judge that the letter of the law has not been breached, no-one is culpable for the abuses and injustices, the 'externalities' and 'collateral damage', upon which corporate profitability depends.

Hardly surprising that there is a widespread sense of fragmentation: isolation and loss of amenities (local shops priced out by market forces); a super-rich minority accountable only to self-interest; an underclass excluded from the benefits of affluence but suffering disproportionately from its disadvantages and demonised by the affluent

majority as feckless, violent, criminal. This same majority itself, however, manifests highly problematic behaviour - careerism, consumerism, commodification of culture - and lives by a fantasy of independence that fails to recognise the social *interdependence* upon which it is premised. It is a majority culture that encourages opinion, but leaves little room for civil society. And unfortunately, in the UK at least, government talk of 'social cohesion' largely overlooks this middle class level of fragmentation.

Wholeness

Better than cohesion is wholeness. Firm government might bond a fragmented society - a cohesive Europe would be a fine achievement. But this would not necessarily address the moral and imaginative problems, with their implications for global prosperity and security. If transition is merely to the "free market" regardless of its limitations and injustices, it ignores the transformative potential for good which is, despite everything, central to European history and culture.

An interesting example of a new, holistic alternative is the 'transition town' of Totnes in the English county of Devon. I quote from their website: "Totnes is the UK's first Transition Initiative, that is, a community in a process of imagining and creating a future that addresses the twin challenges of diminishing oil and gas supplies and climate change, and creates the kind of community that we would all want to be part of. ... Our mission is two-fold: to explore and then follow pathways of practical actions that will reduce our carbon emissions and dependence on fossil fuels; to build the town's resilience, that is, its ability to withstand shocks from the outside, through being more self reliant in areas such as food, energy, health care, jobs and economics." The great and good in the EU may smile. But here is civil society challenging the institutional paralysis of high-level government in face of possibly the most devastating problem of history. If networked local initiatives throughout Europe were to confront exploitative agribusiness, multinational monopolisation, and inadequately regulated privatisation of natural resources, perhaps the fatalistic adage, *plus ça change, plus c'est la même chose*, would be disproved.

The Religious Dimension

Religion addresses fatalism - whether belief in the inevitability of 'progress' or belief that there is nothing new under the sun, belief in genetic determinism or belief in the phenomena of matter as coded revelation of an all-knowing intelligence, belief that self-referential sceptical method is worthwhile or belief in materialised psychic projections as controlling "beings". Religion brings us into wholeness with our capacity for hope, to a knowledge of happiness beyond what is conceivable.

Re-ligio binds together that dutifulness which is so off-putting in civil virtue, with the inner freedom and unaccountable energy that a cerebral culture pigeonholes as "mystical", and that is purely and simply love. It embraces psychological normality and responsible citizenship, and the experiential integrity of brokenness, suffering, powerlessness, perversity and non-sense.

In providing venues and opportunity for intercommunion between people of all ages, backgrounds, and tastes, it affirms common humanity over against a culture that fragments into age, income, race, and interest sectors. Offering continuity of grassroots presence, it can bring to civil society an historical awareness and range of local connections, free of political favour, that no other organisations have. And it can mediate within local communities the wider vision and contacts that enable creative synergy.

Organised religion in practice often conforms to its worst anti-type, and many reject it or discard it as irrelevant to authentic spirituality. But religious communities of all kinds must live their faith with courage and compassion (and in so doing, of course, sociologically contribute to the healthy pluralism of civil society). They must envision new possibilities for the good, speak against abuses of power, and refuse to let their faith be appropriated to the service of reactionary nationalism or ethnic discrimination. They should support and co-operate with government and civil society initiatives (such as the Transition Town movement) for the common good, without becoming manipulated by funding criteria. They should engage in peace-building and reconciliation with those of other faiths and with non-believers. Stewards of the mysteries, they should not retreat into cult, but should strive to offer a hermeneutic of "the good" - modelling Aristotelian *magnanimity* for a culture that struggles to find a mean between punitive audit and unaccountable "originality".

European 'Transition' in the Context of Global Change...

Finally religious groups must demonstrate, without aggression or apology, *holiness* - that decisive celebratory dimension to reality that relates to *wholeness of being* rather than *totality of realisable potential*. This it does in ritual: the universal human need for signs finding its level in a drama which proclaims - but neither argues nor seeks to prove - meaning, value, and purpose. Bringing the functions of bodily existence (individual and social) into joyous reconnection with the inner movements of the creative imagination, the recording soul, and the thinking mind - here is the entirely unnecessary, essential contribution of religion.

PREVENTION OF SOCIAL MARGINALIZATION OF CHILDREN AND YOUTH - POLISH EXPERIENCE

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Abstract:

In the times of global crisis of values and socio-cultural changes which have big influence on the condition of contemporary youth, the work in the essential sense of it over planning and realization which results in forming a functional system of helping children and youth who are endangered of marginalization must embrace the widest area as possible. That means complex system of help and support in the following areas: education, work, training of social skills which are necessary to live in an open society. In the times of political and economic integration the criterion of efficiency of the system of help and social rehabilitation makes it universal. Even though the symptoms of marginalization are determined by the characteristics of the environment in which they appear it is still absolutely certain that they are based on the material and spiritual poverty, disfunctional families and educational institutions.

The critical look at the experience of various countries, also Poland, as well as following practical solutions in terms of solving the problem of social marginalization, it appears crucial in all the countries of the European Union but most importantly the ones which are in the initial phase of changes not only in the political and economic sense but also in terms of awareness of the dangers which might be caused by following certain solutions without estimating the threats.

This paper presents Polish experience in the context of prevention of social marginalization of children and youth. It analyses the ways of functioning in open and closed social - rehabilitation institutions. It focuses on the work in an open society and put emphasis on the work of a street pedagogue.

In terms of helping children who live in the street it is extremely important to look at the issues from the point of view of the various social and cultural factors and also take into consideration individual conditions characteristic to each child.

This pronouncement shows various programmes aiming to limit marginalization problem which were put into practise in Poland.

The effects of marginalization influence the whole society as well as certain individuals. Apathy, passive attitude, lack of trust to others, violence are only few of components describing the attitude of the marginalized person.

This pronouncement indicates various actions which must be taken to prevent marginalization, for example cooperation with schools and families of those children, and shows the most important forms of working with them like psychoeducational classes, socio-therapy, educational games, corrective and compensating classes. It points various and the most efficient methods of work with families and children, which lead to preventing social marginalization.

Keywords: street children, abandon, integration, marginalisation, rehabilitation

Introduction

In the times of global crisis of values and socio-cultural changes which have big influence on the condition of contemporary youth, the work in the essential sense of it over planning and realization, which results in forming a functional system of helping children and youth, who are endangered of marginalization must embrace the widest area as possible. That means complex system of help and support in the following areas: education, work, training of social skills which are necessary to live in an open society. In the times of political and economic integration the criterion of efficiency of the system of help and social rehabilitation makes it universal. Even though the symptoms of marginalization are determined by the characteristics of the environment in which they appear it is still absolutely certain that they are based on the material and spiritual poverty, dysfunctional families and educational institutions.

The critical look at the experience of various countries, also Poland, as well as following practical solutions in terms of solving the problem of social marginalization, it appears crucial in all the countries of the European Union but most importantly the ones which are in the initial phase of changes not only in the political and economic sense but also in terms of awareness of the dangers which might be caused by following certain solutions without estimating the threats.

1. Children in the face of contemporary challenge of social sensitivity

Present days are marked by many new challenges, which whole societies and nations must face but also, very often left alone young person in his/her struggles. In Poland after the year 1989, after the change of the system of government, many political and economical reforms had been initiated. Unfortunately, for many Polish people those processes turned out to be disadvantageous. A big part of the society fell into poverty. Population's level of professional activity and access to work decreased. The number of families on welfare increased. Also seeking for an extra job to make ends meet and constant feeling of having no perspectives for better future had been an everyday life issue which resulted in non properly functioning families and what follows that, incorrect processes of upbringing and socialization of children. Having observed young generations, we notice behavior typical of disordered "borderline" type of personalities. They are unstable, unsecure of their own future, often in conflict with people in their age group and also with law. They are emotionally unstable. They cannot put up with the challenges of the present day, which results in their destructive and auto-destructive behavior. They run away from homes and schools. Very characteristic of them is an early sex, drugs and alcohol initiation. They steal and participate in criminal activities. A large number of children grows up in families which struggle of poverty, unemployment, in which alcohol and violence play a dominant role. Those families lack a positive role-model which children could follow. Learnt hopelessness of their parents' lets them only count on social benefits. Parents cannot cope with their own problems and at the same time they forget about their children. Children very often are made to count only on themselves, sometimes a coincidence is the factor which decides how they are going to live their lives, whether or not, they are going to have a chance to develop their intellectual abilities and also whether or not, they will be able to cover their basic needs, whether they will succeed or, because of not having any other option, will be made to live the same way as their parents do. In the case of parents' disability to up-bring children a coincidence must not be the factor which decides on children's development. The state and its institutions are responsible of every child's and young person's development. In Poland a number of activities, has been initiated and their aim is preventing and limiting social marginalization among

contemporary children. Nowadays in Poland the number of people living at the level of social minimum and poverty equals 10 million and about 60% of people in this huge group is youth under 19 years of age.

The group of risk factors include as follows:

- poverty,
- split up families,
- battered children by their own parents, which results in emotional disorders, rebellion, runaways from home, etc. incompetence of parents in upbringing children,
- single mothers,
- both parents unemployment, sometimes the unemployment of one parent and unemployment of young graduates of various schools, who despite their ability and readiness to work can't find a job; their unemployment takes away their hope to give sense and meaning to their lives,
- quitting schools and lack of continuation of education because of being neglected by the family and the school,
- experience with drugs and overusing alcohol,
- increase of violence and aggression in schools,
- high level of juvenile delinquency,
- inaccurate management of free time – the most often young people brought up in hard or bad material and family conditions, do not know and cannot manage accurately their free time,
- inefficiency of educational institutions.

In Poland, because of the reason of the listed above factors, there we have a category of youth with worse start and perspective in life; youth whose parents because of low material status, living in poverty, are not able to provide to their children material support, for example for continuing education, learning foreign languages or organized rest during holidays. Children from these families very often do not even bring lunch to school and cannot count on having dinner at home, so they get it in school, on condition that the school is given the money to provide it to hungry children. These young people notice very quickly the specific difference of the situation they are in, which causes among them the feeling of having lower social abilities and perspectives. As researches

show, juvenile criminals, come from the families, which live at the very low material status and what is connected with it, from families of very low and the lowest social status.

2. Actions taken in order to prevent young people from having a worse start in life

We noticed in Poland that a large number of people in our society had a worse start into life, that's why we initiated many activities aiming to prevent and limit the process of social marginalization of children. There was a Strategy of the State for the Youth elaborated. Education, employment, and young people's participation was indicated as the basic area which had to be reinforced in order to prevent marginalization in Polish society.

Young people's education

The fundamental strategic target of the state was an aspiration to increase the quality of education and making education common. The percentage of people in an age group 15-18 being educated in high schools in the school year 2000/2001 was 90,1. In comparison to other countries in European Union, in Poland, this number concerning particular age groups appears to be quite high.

The highest increase of this number of educated people was observed in schools of further education. It has been worked on to raise the quality of education in schools in villages and also in vocational schools. It refers to the learning conditions as well as schools' equipment. There are actions taken place to make the process of learning foreign languages common, especially English, which is already being taught at the level of primary education.

The access to further education levels of education for the young people living in the village areas was increased and also possibility of continuous learning and distant education was created.

Young people's employment

The intensity of unemployment among youth, within the years 1999-2006, for the age group 15-24 was twice as big as the rate of unemployment for the whole population (including the age group 18-19 which was three times higher). It is expected from the state to introduce

the employment policy for young people and not only for the graduates, but also for the whole population of youth. Strong emphasis has to be put on the group of young people staying out of the system of education and being prolong unemployed. One of the problems of young people is the lack of believe in the possibility of changes in the work market, which decreases young people's working activity for example creating their own jobs as well as intensifies the attitudes towards migration or staying completely passive. There are certain helping programs being introduced, which are supposed to help in creating new jobs, the changes of law are being introduced, too which are to convince employers as well as employees, that it is worth to hire young people. One of them is the program "My First Job" introduced by Ministry of Economy, Work and Social Politics, which turns out to be a very efficient tool in the prevention of unemployment among young people.

Young people's participation in public life

The following activity aiming to prevent marginalization is creating conditions for citizens to participate in public life. The mentioned conditions means encouraging young people to be actively involved in the process of making their decisions within various levels of social and state management, especially within their local community. Leading conversations with youth concerning the most important social problems is the task for the state administration and local governments.

Free time, culture, sport, tourism

Organizing free time for youth should be the result of the diagnosed needs submitted by young people, parents and their educators. There are activities taken place in order to increase the access to forms of spending free time in the places of living or in forms of organized trips. The process of changing the previous habits of spending time into new, commonly known and accepted in Europe modeling the animated ways of spending free time is the next challenge for the state. It is connected with the need of broadening the group of addressees of after-class and after-school participants (especially in the areas of culture and tourism) to youth with social problems. In terms of young people's tourism the trends of social differences are highlighted. Commercialization of tourism and relaxation is observed. That is the reason why institutions and

organizations, which organize children's summer camps and winter holidays, are being supported and also family tourism. Various programs are being realized such as "Holidays in the City" or "Colorful Summer", etc. The number of sports institutions are being developed, which organize all sorts of activities for young people.

Prevention and health

The health conditions of youth in Poland does not differ much from an average young European. However the system of health care over a disciple and a student is in need of systematical improvement.

The following important task is to promote among young people the healthy life style, free from addictions. In Poland, the age level of young people having the first contact with a cigarette or the first glass of alcohol is decreasing. The number of young people over using alcohol is rising, and especially girls and young women smoking cigarettes. The danger of widespread of drugs is rising (almost every third student has tried a drug). The awareness of the danger of HIV is low that is why special emphasis has been put on the proper sexual education.

3. The participation of non-profit organizations in limiting the effects of social marginalization

In our country the non-profit organizations begin to play a bigger role in covering the basic needs of local societies and various social groups as well as in solving serious social problems. Their role is becoming very strong in the whole system of social care. Social care cooperates and is determined to develop this cooperation with the institutions of public administration and also with the non-profit organizations.

This cooperation is aiming to embrace such issues like:

- social care,
- promotion of sport and physical education,
- prevention of social pathologies, including alcoholism and drug addiction,
- support for handicapped people,
- agriculture and citizens protection, culture and art, protection of cultural heritage and traditions of science, education, and formation.

A large number of these organizations uses the money given from the European funds for realizing many projects for young people in danger of marginalization. Into their areas of work must be included working with street children. This kind of work will be described in detail below.

The author of this publication works with young people in the street environment and knows the conditions and forms of this kind of work in practice.

Street-work – one of the methods of prevention of children marginalization

In Poland, within the last ten years, in the streets, yards and settlements of block of flats, we meet children and youth called “street children”. The most effective in counteracting against this pathology are the pedagogues who work in the street and also street-workers.

Street-work (outreach), is understood as work in street (social street work, a method of extrinsic reaching to people in need). This kind of work means that all the helping actions are lead away from the traditional helping institutions. Street-worker reaches people in need in the places where they most often are. The specific needs of the people he/she meets specifies the methods of his/her work. These are individual people or the groups of people, who do not want or cannot get support from the helping institutions. Social marginalization and stigmatization is very often their personal experience which is the effect of their place and position of these groups in the society. The reason of their reluctance to contact the institutions is because their previous experience was negative.

The idea of working with children in the street, in their local environment, came up in the moment when the pedagogues and other specialists hired in the institutions such as day care centers, play groups, guidance services, clubs, etc., understood that many children omits these places. Children either don't want to or cannot find a way to get help so the pedagogues find them to meet them and to offer them a way of spending free time together, to play together, and through these actions lead them to the institutions which can offer them help and professional support.

The basic form of work of street-pedagogues is animation, that is why they are called animators. Animation means leading children in such way so that they won't feel forced and will let them make their own decisions.

In Poland there are various projects put into practice of street work. They are directed to people with risky sexual behavior, drug users and street children.

A) Street-work directed to people with risky sexual behavior

The group of recipients are people of both sexes, who offer sexual service, men having sex with men and youth in the age of sexual initiation. Methods of working with them is basically guidance and education joined with distribution of educational materials and condoms, encouragement to make the tests for presence of anti-HIV antibodies, sexual education, education on healthy sexual life. Women who offer sexual service are in a very specific situation. Marginalized, stigmatized and rejected, they very often function on the verge of having a conflict with law. They live on the margin of the social life. They do not seek for help in institutions. The street-workers helping people in this group have a few important tasks to complete:

They give psychological support through:

- personal contact without judging nor stigmatizing,
- providing information on sexually transmitted diseases,
- propagate the rules of safe sex and safety at work,
- provide information which institutions make blood tests on HIV and support people with HIV and AIDS,
- support people who want to quit prostitution,
- provide guidance services and offer benefit from social care,
- work with people who offer sexual service no matter their nationality, age or sex.

In Poland there are a few projects realized which are directed to people who have risky sexual behavior, for example TADA program (www.tada.pl) in Szczecin (Stettin), Gdańsk, Zielona Góra and Warsaw; project PARASOL (Eng. Umbrella) in Kraków (Cracow); a group of street-workers working in gay and lesbian association LAMBDA in Warsaw.

B) Street-work in the environment of people using drugs

The group of clients in this group are the people who occasionally take drugs as well as drug addicts who take drugs straight through the vein.

Because of the fact that they are in the condition of drug intoxication or seeking for a drug, the addicted people never come to the guidance services. They forget about the working hours of these institutions or they simply do not want to accept their offers. In the practical aspect of street-work, workers actions are based on educating people about the consequences of using drugs and also exchanging the used equipment into new and sterile. The basic element of this kind of work is the conversation about life situation of drug addicts, possibilities of changing this situation by getting help and support from helping institutions and possibilities of beginning treatment. There are at least 25 programs of syringe and needle exchange.

The offer of helping people who take drugs occasionally is based on education on safe usage of drugs, symptoms of overdosing and ways of reacting when they appear, possible effects of often usage of a certain drug. Additional to this offer there is education on safe sexual behavior.

C) Street-work among street children

Street children are the people, who because of the fact of their parent's disability to fulfill parental obligations of taking care and upbringing them, spend most of their time away from home: in the street, yard and other places of uncontrolled activities. Those are children who most often have homes and parents but those homes are dysfunctional and that is why children stay away from those homes. In the street environment these children are in danger of many disadvantages for them in terms of their proper development in life. Among them there are children and youth, who ran away from homes or other institutions. Young people, who have to grow up all by themselves, without any positive adult role-model, are in the danger of getting into conflict with law, contact with drugs and alcohol, prostitution. They are not able to ask adults for help not to mention the traditional helping institutions.

Street children can be met in the neglected settlements of blocks of flats, districts, huge settlements, game rooms, dark ends, in the gates, parks, railway stations, bus stops, restaurants and bars. We meet them in big cities as well as small towns and villages.

It is very hard to estimate how many children live in the streets of Poland. It is said that five out of one hundred of children in the school age are the street children. The For Poland Foundation is realizing a program titled "Street Children". It gives financial support to numerous organizations which run day care centers, family therapy, hostels for people in crisis or work in the street. Mostly street pedagogues are committed into this work, who within each year become a bigger group, who work no matter the difficult conditions – in streets, in dark areas, railway stations. Those are people whom these children can trust, who give support to these children, people who can encourage them to go back to their homes, return to schools. Street-workers help them cope with fear of talking to their parents, support them in quitting alcohol and drugs. The realization of the described program is reinforced by the work of psychologists and other professional institutions such as psychological and pedagogical guidance, social workers, therapists.

The final remark

The presented above ideas are the signals, that in Poland as well as in Romania, we are facing a social problem, which causes disadvantageous effects in the present times and also in the nearest and further perspective.

There is a diligent need for the states to start taking proper actions, accurate to the needs of the members of the society, social politics directed mainly to the family and youth. It is also important, that into these actions, not only organizations were involved, but also the whole local community.

Only harmonious, wise cooperation of all the people concern about the young generations lives may bring expected effects.

PRIORITIES, STRATEGIES AND VALUES OF CIVIL SOCIETY. COMPARATIVE ANALYSES BETWEEN ROMANIA AND REPUBLIC OF MOLDOVA

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Abstract:

The emergency of civil society in Romania and in Republic of Moldova, as in other post-communist countries, in Central and Eastern Europe, is the result of a relatively recent social process.

In over 17 years of “transition”, new perspectives on the system of social services have been created, the accent falls on the need for social services that would complement the care provided. The paternalist state, which provided housing and jobs, which encouraged the increase of birth-rates by any means, gradually turned towards a mix of social and liberal conceptions.

The freedom for the development of the civil society, on the backdrop of funding opportunities offered by the various programmes and social interventions, has undeniably been a driving force for the promotion of social services in Romania and in Moldova.

On the other hand, the road taken by Romania in recent years has also outlined obligations in the political and lawmaking sphere, by harmonising the changes at European level.

Our analysis is part of the EUDIMENSIONS – a FP6 Research Project (STREP, Priority 7, 4.2.1. New visions , new neighborhood. CIT-CT-2005-028804), where we are partners. The main task of EUDIMENSIONS is to analyse the cooperation processes of civil society organisations and the multilevel contexts within which they operate. Case studies – 8 in the project, including Romania-Republic of Moldova - were focused both on specific communities and cross-border co-operation networks that often transcend local, regional and national levels in order to advance their agendas. Particular attention has been paid to social, cultural and gender-related issues that have not received sufficient attention in studies of cross-border co-operation.

The main project objective(s) are: to seek to understand the implications of new European geopolitical contexts for cross-border civil society interaction; to analyse civil society co-operation processes, the multilevel contexts within which they operate and the role of the EU in conditioning or shaping relationships within the Neighbourhood; to

understand how social knowledge and power can be mobilised as positive resources for regional co-operation and development.

Our study employs a variety of different analytical approaches. Qualitative, perceptual data is what interests us here primarily. At the same time, we standardise certain methodological aspects in order to assure coherence and comparability. Empirical work were organised around the following data-generating activities and research tasks: the collection and analysis of relevant official documents, political statements, press material, reports of debates, brochures, and local archival work, the collection of perceptual data involving interviews and group meetings (seminars) with policy-makers, network actor representatives.

Through triangulation we will test the explanatory value of the various data sources as well as evaluate the analytical domains chosen. This information was compared with: opinions voiced and images and perceptions invoked by the media and the assessments provided by existing research literature.

To assess the state of civil society, we examined civil society along four main dimensions: the structure of civil society, the external environment in which civil society exists and functions, the values practiced and promoted within the civil society arena and the impact of activities pursued by civil society actors.

Keywords: civil society, strategies, values, cooperation, partnership, EUDIMENSIONS, social responsibility

I. Introduction

Until the mid-nineteenth century, there were no significant civil society activities in Romania. Civil society traditions developed at a relatively late stage in the history of the country (Epure et al. 1998). Historically, compared to Central and Western Europe, philanthropy and non-profit activities were not as deeply rooted in regions with ethnic Romanian populations (Moldavia, Wallachia and Transylvania), which form the modern state of Romania. Prior to the mid-nineteenth century, there were several important barriers to modernization that prevented the emergence of a genuine civil society in the Romanian provinces: geo-political instability, caused by the fact that the emerging Romanian state stood at the borders of three competing empires (Austro-Hungarian, Tsarist and Ottoman), prolonged foreign rule, which inhibited the development of strong political and societal institutions, the rural nature of the provinces, the general agrarian nature of Romanian society (Epure et al. 1998).

The institutional basis for the development of civil society and the non-profit sector were established in the period between the two World Wars. The Constitution of 1923 provided the first full recognition of citizens' freedom of association, and the brief democratic interlude of the interwar period led to the emergence of a new, albeit fragile, civil society,

as cultural and sport association began to flourish and the Romanian Red Cross began to emerge, together with many other organizations targeting disadvantaged groups (ARC 2003:11).

By the 1950s and 1960s most of the remaining civil society structures were either already destroyed or subordinated under the ruling party (ARC 2003:11). The atomizing effect that these policies had on society led to a very powerful state and the isolation of individuals and families. It also prevented the development of larger, alternative social relationships.

A 'benign' civil society began to develop in the 1970s and 1980s. In this period, civil society did not have the militant character that was beginning to develop in other Eastern European countries and mainly consisted of outdoors clubs (for hiking and caving), and environmental protection and cultural associations. In some cases, these CSOs had a significant number of voluntary members and were mainly funded by the state or through communist organizations (ARC 2003:12). However, during communism there was no such thing as an independent civic movement.

Due to the unfavourable communist legacy, the re-emergence of a non-profit sector after 1989 proved to be a lengthy and difficult process. In the absence of a genuine associative culture, the emergence of a new civil society needed to be built on a different bedrock, placing greater value on elements related to the non-governmental status and social mission of the associations (Epure et al. 1998). In order to master the painful dynamics of the complex transition processes, the development of a strong civil society and the sustainability of a non-governmental sector were considered essential for the positive post-communist evolution of Romanian society. Therefore, international institutions, Western governments and various foreign donors developed programmes to support the emerging Romanian civil society.

In its recent history, since 1989, two different stages of development of Romanian civil society can be identified. At the beginning, in the early 1990s, civil society had to liberate itself from the legacy of the totalitarian regime and fight to create an autonomous space, outside the state. In the second half of the 1990s the political environment improved and civil society began to have a better profile and play more diverse roles in Romanian society.

The emergence of a nonprofit sector in Romania, like in other post-socialist countries in the region, is the result of relatively recent social

processes taking place in the complex environment of an emerging civil society, which is filling the space between the market and the state created by the institutional upheaval after 1989. Indeed, the fall of the former regime triggered a growth process in the number of non-governmental organizations (the most commonly used term for nonprofit organizations in Romania), which are considered an essential part of civil society in Romania. For the most part, these organizations emerged on the basis of a never repealed pre-war law, establishing associations, foundations, unions and federations as the main legal forms. (Saulean et al. 1998: 3).

Over the following years, the relations between NGOs and political decision makers slowly improved. In 1996, a Christian Democratic coalition won the national elections (the Democratic Convention) and a “democratic” president was elected. The new governmental coalition was supported by civil society, particularly by Civic Alliance, which was very influential at the time. Many prominent NGO leaders joined the new administration as presidential advisors, ambassadors and government officials. Nevertheless, the initial great expectations by civil society representatives were not met. In fact, the shift in government had some unpredicted negative effects. The democratic political change was regarded by international donors as a sign that democracy was consolidating, and, as a consequence, aid to civic organizations dropped dramatically (Stoiciu 2001:14). Thus, for the first time, CSOs started to consider the new challenge of ensuring the sustainability of Romanian civil society.

II. Characteristics of Romanian and Moldavian civil society organizations

The freedom for the development of the civil society, on the backdrop of funding opportunities offered by the various programmes and social interventions, has undeniably been a driving force for the promotion of social services in Romania and in Moldova.

On the other hand, the road taken by Romania in recent years has also outlined obligations in the political and lawmaking sphere, by harmonising the changes at European level.

II.1. Dimensions of civil society

To assess the state of civil society, we can examine civil society along four main dimensions (CIVICUS, 2005: 12):

- The **structure** of civil society (e.g. number of members, extent of giving and volunteering, number and features of umbrella organisations and civil society infrastructure, human and financial resources);
- The external **environment** in which civil society exists and functions (e.g. legislative, political, cultural and economic context, relationship between civil society and the state as well as the private sector);
- The **values** practiced and promoted within the civil society arena (e.g. democracy, tolerance or protection of the environment) and
- The **impact** of activities pursued by civil society actors (e.g. public policy impact, empowerment of people, meeting societal needs).

1) Structure

The structure remain the weakest dimension of Romanian CSO's (civil society organizations) for the following reasons:

- Low citizen participation
- Poor level of organization
- Limited interrelations among CSO's
- Strong dependency on foreign financial support
- CSO umbrella bodies are often seen as inefficiently

Non-partisan political action. Several surveys and studies show that a minority of Romanian citizens have ever undertaken any form of non-partisan political action (e.g. written a letter to a newspaper, signed a petition; attended a demonstration).

Charitable giving. In Romania a minority of people donate to charity on a regular basis. The CSDF/ISRA survey revealed that 39% of Romanian citizens made donations in 2004 (9% of them often or very often and 30% sometimes), while 44% never made donations during the year. Another survey shows that 38% of Romanian citizens made a donation in the last 12 months (2002), while 55% have donated in an organized manner, since 1990 (Association for Community Relations 2003: 23).

CSO membership. A minority of Romanian citizens belong to at least one CSO. According to the Public Opinion Barometer from October 2003 an estimated 9% of the Romanian citizens are members of at least one CSO, defined as professional association, political party, trade union, religious

group, environmental group, sports association or any other organization and association which does not generate any income. The *2003 USAID NGO Sustainability Index* also estimated that only 7% of Romanians were members of an NGO, compared to 41% who belonged to condominium associations or 36% to labour unions.

The membership of trade unions is officially estimated at around two million members (*Starea sindicatelor in Romania 2000*). Half of the Romanian working population belongs to a trade union. Romania is considered to have the highest percentage of trade union members of all the EU accession countries (Freedom House, *Nations in Transit. Romania 2004*). However, mass media have shown that these data are exaggerated.

Volunteer work. In Romania a very small minority of people undertake volunteer work on a regular basis (at least once a year). In a study conducted by ARC, only 8% of those interviewed declared they had ever volunteered in an organized manner (ARC 2003: 38). The CSDF/ISRA survey also showed that around 7% of citizens did voluntary work regularly. An additional 25% indicated that they did voluntary work sometimes or rarely.

Community action. A minority of Romanian citizens have participated in a collective community action within the last year (e.g. attended a community meeting, participated in a community-organized event or a collective effort to solve a community problem). Empirical data on this issue is scarce. However, results from the CSDF/ISRA survey revealed that in 2004, 37% of citizens were directly involved in solving a specific problem of the community, while 63% declared they have been involved very rarely or never.

2) Values

- Romanian and Moldavian civil society promote and practices positive values.
- CSO's are active in promoting transparency in public affairs, but we still have a limited internal transparency and accountability within CSO's.

Democracy and tolerance are values that Romanian CSOs have traditionally promoted, as made apparent by the fact that since the fall of the totalitarian regime in 1989 civil society actors have been actively involved in rebuilding the Romanian society on the basis of democratic institutions and inter-ethnic tolerance. Environmental sustainability and, particularly, gender equity are not regarded as "traditional" or indigenous

values by most of Romanian society, and are embraced by only a limited number of social actors. However, the CSI revealed that CSOs active in promoting these values have become essential partners (if not indispensable, as in the case of environmental NGOs) for the Government and foreign donors, and that they are catalysts for social change. A large number of Romanian CSOs are engaged in projects aimed at eradicating poverty, either by directly supporting the poor or by creating opportunities for disadvantaged or marginalized categories of people.

3) Environment

- The environment of civil society in Romania is mostly enabling long term sustainability of CSO's operations.
- The level of cooperation between civil society and government, business sector and large public remains low.
- The associative sector is evolving in an uneven way.
- Most of the CSO's are established in capitals (Bucharest and Chisinau) or in university centers
- In this cities CSO's have a larger access to information, are more experienced and work with much more donors. In other regions of the countries development of the sector devolves more slowly.
- In Moldova there are special situations in Transdnier and Gagauzia.
- If we compare Transdnier with other regions of Moldova, due to the political regime local CSO's have a very limited access to the information about the activity in the associative domain.
- There are just some donors that are financing the activity of the associative sector from this region.
- Some of the CSO's from Transdnierian region that are collaborating with foreign donors and / or organizations from the Republic of Moldova are confronting with a risk of a very harsh control that is done by the local authorities and sometimes authorities create on purpose obstacles for the activity of the CSO's.

Studies made by Romanian civil society organisations show a non-uniform distribution of social services providers across the regions of the country. CSO's are largely concentrated in urban area.

The regional distribution of registered NGO's suggests that around 20% are based in Bucharest and almost 40% in Transilvania.

Region	% of NGO's	% of population
Bucharest	19.9%	16.3%
Banat and Crisana	13.2%	13.4 %
Moldova	14.9 %	18 %
Muntenia and Oltenia	14.7 %	24.6%
Transilvania	37.3 %	22.2%

Distribution of CSO's by regions. Source: ONGBit

Most of resources are concentrated in Bucharest, in the major urban areas (mainly university centres) and in Transilvania. The reasons are that these regions have a better-developed economy and infrastructure. The biggest receiver of social benefits and allowances is, with no exception, the North-East part of the country, recognised as the poorest region, but also with a positive birth rate.

CSO's from Moldova, answering to the question: „On which level your organization are working?” (*Study on the Development of Non-Governmental Organizations in the Republic of Moldova, 2006: 47*), provided these data:

	Organizational level	
	National	Local
Fields		
Education, research	67%	33%
Mass-media	64%	36%
Economical and community development	45%	55%
Human rights protection	69%	31%
Social services	52%	48%
Ethnic minorities	69%	31%
Residency		
Urban	74%	26%
Rural	7%	93%

Region		
Northern	5%	95%
Central	86%	14%
Southern	0%	100%

In the same country, Moldova, the geographical distribution of the resources is shown by the answers to the question: „Have you been supported by donors in last 2 years?” (*Study on the Development of Non-Governmental Organizations in the Republic of Moldova*, 2006: 89):

	YES	NO
Organizational level		
National	65%	35%
Local	52%	48%
Fields		
Education, research	66%	34%
Mass-media	75%	25%
Economical and community developme	56%	44%
Human rights protection	69%	31%
Social services	63%	37%
Ethnic minorities	10%	90%
Residency		
Urban	61%	39%
Rural	61%	39%
Region		
Northern	47%	53%
Central	65%	35%
Southern	44%	56%

Existence of umbrella bodies. A large majority of trade unions and employers associations are affiliated with federations. According to trade union representatives, the affiliation rate for trade unions, SME associations and pensioner organizations is around 90%.

The situation for NGOs has been less clear. During the regional stakeholder consultations the participants were generally able to identify several important Romanian umbrella organizations, including: the Federation of NGOs Active in Child Protection (FONPC), ProChild Federation, National Union of People Affected by HIV/AIDS Organizations (UNOPA), The Romanian Environmental Partnership Foundation (Fundatia pentru Parteneriat) and Civil Society Development Foundation (CSDF).

Yet, the perception expressed by civil society representatives was that only a small minority of Romanian CSO's belong to a federation or umbrella body of related organizations. In an electronic survey conducted in 2005 by CSDF, 25% of the respondent organizations declared that they are affiliated to national federations.

Some NGO's are working together in coalitions, mainly occasionally, on issues of common concern. The competition for financial resources, personal conflicts and better relations with public institutions are the most frequent obstacles for a better cooperation among them.

The main financial sources of NGO's are project-based grants; a small part is coming from membership fees, from sponsorships and donations from national and multinational corporate, from fundraising events, from directing of 2% from individual's annual income taxes.

The national-interest programme launched by the public authorities in 2006 adds to the previous funding categories in the domain of child welfare/child protection a further four disadvantaged categories: people with disabilities, elderly individuals at risk, victims of domestic violence, the homeless.

In Romania, the NGO sector has been involved in the debates organised on the occasion of legislation changes, as well as for drafting national policies and standards for social services aimed at children, the disabled, the elderly, to the victims of domestic violence, to the ethnic group of the Roma, to victims of drug abuse and to the family in general. In Moldova, the main donors are:

	I don't know the donor	Don't collaborate	We submitted projects	We submitted projects	Other kind of collaboration	Don't know
Soros Foundation Moldova	2%	47%	17%	24%	9%	1%
TACIS	10%	73%	7%	4%	4%	2%
World Bank	2%	72%	12%	6%	4%	2%
USIS, USA Embassy	6%	66%	10%	11%	7%	1%
UNICEF	9%	70%	5%	8%	8%	1%
UNDP	19%	64%	4%	5%	7%	1%
CPBR	45%	47%	1%	2%	2%	2%
Swiss Embassy	18%	71%	5%	2%	2%	2%
USAID	25%	61%	2%	6%	4%	2%
SIFM	25%	66%	2%	3%	4%	1%
CORD AID	43%	51%	1%	2%	2%	2%
Council of Europe	12%	70%	5%	3%	9%	1%
DFID	34%	49%	7%	3%	6%	1%
NOVIB	50%	46%	1%	2%	1%	1%
UK Embassy	13%	74%	4%	2%	5%	2%
Embassy of Netherlands	16%	73%	3%	3%	3%	2%
Other	0%	0%	10%	30%	41%	19%

In Romania, most of the organisations depend on the foreign grants which are decreasing in last time due to European Union accession. There are already cases of NGO's that interrupted their activities, as the foreign funding ended (USAID and other american grants, Phare funds). Domestic support is considered limited; local fundraising is not successful in generating significant income, considering the poor economic condition. For covering a part of absence of grants income,

many NGO's become more business-orientated and started commercial activities such: training and consultancy services or sale of products made by beneficiaries.

Major challenges that civil society in Moldova faces at the moment (*FINAL REPORT on the International Conference "The European Union and Civil Society in Moldova"*, 2006):

- High reliance on foreign funding and low level of self-sustainability;
- Activities of civil society organizations unroll around the patterns supported by the donors, therefore there is often lack of consistence in CSO's objectives and activities over time, as well as their high concentration in certain fields;
- Weak and fragmented representation in relations with the Government;
- Limited contacts with EU-based CSO's;
- Limited knowledge on funding available from EU and EU Member States;
- Complicated requirements and procedures for submitting project proposals to the European Commission.

4) The Impact

- The overall impact of CSO in Romania and Moldova is estimated to be moderate.
- CSO's have been most successful informing and educating citizens and empowering marginalized people.
- CSO's have been less successful in building capacity for collective action.
- On the whole, CS has a rather negative public image because:
 - CSO's activities remain invisible for a part of population;
 - CSO's are more oriented to the donor's priorities;
 - CSO's (excepting media and trade unions) are very weak in promoting active involvement of citizens. (CIVICUS, 2005)

III. Methodology of civil society organizations mapping

III.1. We had used multiple sources of data:

Review of existing structured information:

- National catalogues of NGO's
- Data bases from donors and networking umbrella bodies
- Data bases of CSO's existing on 3 Euroregions and on county levels
- Data base from The Cross-border Cooperation Office
- Lists from Chambers of Commerce
- Web portals and sites of NGO's, trade unions, professional associations

Direct from CSO's data collection:

- Information from CSO's (snowball technique)

Checking and validation of data was made by e-mail, phone and visits. Prior to this information from different data bases was compared and cross-checked.

III.2. Types of CSOs included in the study:

1. Religious organisations
2. Trade unions
3. Advocacy organisations (e.g. civic actions, social justice, peace, human rights, consumers group)
4. Service Providers (education, health, social services)
5. Training and research organizations (think tanks, resource centres, non-profit schools, public education organizations)
6. Non-profit mass media
7. Women's associations
8. Youth and students' associations
9. Socio-economic marginalized groups' organizations
10. Business and professional organisations (chambers of commerce, professional organisations)
11. Local organisations (villages associations, local development organisations)
12. Associations/local groups (associations of parents)
13. Economic organisations (cooperatives, mutual savings organisations)
14. Ethnical/traditional/indigenous associations/ organisations

15. Environmental organisations
16. Cultural organisations
17. Sport clubs and recreational organisations
18. Donors and fundraising institutions
19. Networks, federations and support organisations
20. Social movements (peace rallies)

III.3. General findings

- Many national data bases are not updated.
- Some data bases contains not valid data.
- There is not, yet, a complete data base with civil society organizations involved in cross-border cooperation.
- Common project at cross-border level are at still on the developing phase.
- In Rep. of Moldova there are several civil societies (according with the spoke language, belongings to “autonomic territory” etc.)

Findings - Romania

The hierarchy of most developed CSO’s activities:

- Social services
- Education and research
- Environment, ecology
- Art, culture, leisure
- Economic and social development
- Professional and business associations
- Human rights
- International cooperation

Findings - Moldova

The hierarchy of most developed CSO’s activities:

- Education and research
- Health
- Art and culture
- Sports, leisure,
- Economic and community development
- Human rights
- Social services
- Environment, ecology

IV. CSO's and private sector

Corporate social responsibility. The concept of corporate social responsibility (CSR) has three main aspects: a responsible approach to employees, a responsible approach to the environment and a responsible approach to the community within which a company operates. A positive trend that has been seen at the level of the business sector in the last years is a growing interest in CSR, especially at the level of larger or international companies. Major companies are beginning to take the potential negative social and environmental impacts of their operations into account.

There is evidence that major companies in Romania have begun to develop CSR strategies. Some of the most important companies in Romania are those working in the oil, concrete and pharmaceutical industry. Due to their field of activity large companies like Lafarge Romcim, Carpatcement or Holcim have a particular interest in the field of environmental protection and try to build their corporate social responsibility identity mainly on this dimension. Companies in the oil industry have also developed CSR strategies, getting involved in supporting environmental protection initiatives. For example Rompetrol supported environmental NGOs in Constanta and their activities related to the Black Sea ecosystem. The same company was awarded a prize for the best corporate report in 2004. Companies from the pharmaceutical industry build their CSR identity by financing projects in the field of health care. A number of companies developed the own fondation and NGO's. (CIVICUS 2005, p. 41).

Corporate Philanthropy. A limited range of Romanian CSO's receive funding from the private sector. While there are organizations for which these resources represent a considerable part of their income, most CSO's depend very little on private business donations. According to Ministry of Finance data, in 2002 sponsorships and donations accounted for 34.4% of NGO income (*USAID 2003 NGO Sustainability Index*).

Funding from business sources is distributed unevenly across civil society's fields of activity. The areas which received most of the funding from the business sector are religious (13%) and educational and research activities which together receive 9.8%. Issues such as charity, health and social services are also high up in the hierarchy. On the other hand environmental protection, human rights and democracy are given a lesser interest by companies (ARC 2003: 33-34).

The study on Romanian philanthropy, undertaken by the ARC and Allavida in 2003, indicates that 61% of all businesses surveyed have never made any donation to charitable purposes. The percentage of companies supporting CSO's activities is even more limited. Even if they occupy the first place among the recipient organizations, NGO's receive only 18.4% of the total business donations (closely followed by schools and kindergartens (17.1%) and Church with 16%) (ARC 2003:33). The data shows that the average donation of companies in Romania is around 0.4% of their annual turnover. Comparatively, studies completed in US show that on average a company makes a donation of around 1.2% of its annual pre-tax income (ARC 2003: 34).

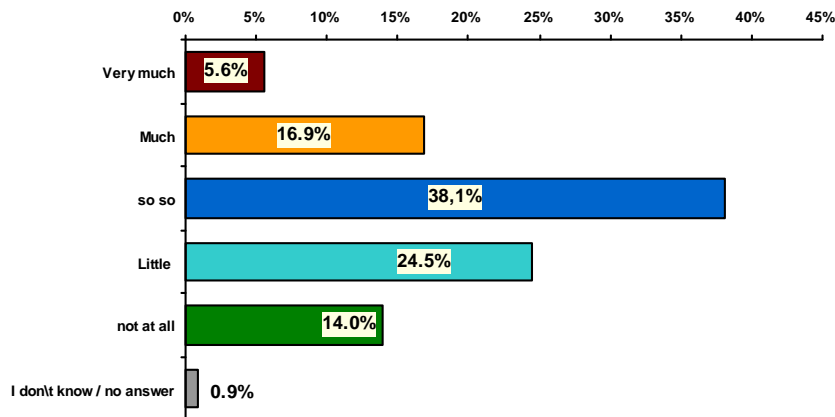
Romanian NGO's working for the alleviation and eradication of poverty benefited mainly from the support of foreign donors such as World Bank, the EU Phare Programme, Western European and US foundations, but also from public funding. In 1998 the Romanian Social Development Fund (RSDF) was established by the Romanian authorities. A significant number of NGO's (as well as local communities and local authorities) have been supported through this fund to develop projects for the benefit of poor rural communities and of disadvantaged groups.

V. Strategies

V.1. The relationships of CSO's with political elite, local communities and state agencies

In the Republic of Moldova there has been recorded¹ a strong mistrust of the personalities in politics. It is remarkable that 32.9% of those interviewed say "I do not trust anyone", almost double the number of those who voice their trust for the character at the top of the hierarchy (17.5%) and very high compared to the 6.6% who voice their trust for the character in second place. The answers indicating "I don't know" (13.8%) and non-answers (12.7%) are most probably just another way of indicating lack of trust.

¹ *Barometrul Opiniei Publice*, Noiembrie 2007, IPP Chisinau, slide 41. (Public Opinion Barometer, November 2007, IPP Chisinau, slide 41).



By comparison, in Romania the same year, 2007², the most trusted politician gathered 54%, while the one in second place got 34%.

Most of the answers given by the representatives of the civil society interviewed pointed to no sustained relationships with political parties or their representatives. There are, however, situations, in which the respondents take part in developing and supporting proposals for pieces of legislation. Most of the examples were in Romania (e.g.: fight against domestic violence, mediation, fight human trafficking). In Moldova, on May 30, 2007, in Chisinau, a *Memorandum of Cooperation for European Integration* was signed between the Ministry of Foreign Affairs and several Civil Society Organizations from Moldova.

Perspectives of CSO actors on their relationships with local communities

According to the statement made by the CSO actors, the connection with the local communities is very tight, the CSO seeing itself as a representative – maybe the most important – of the communities' concerns and real issues.

Many of those interviewed suggested that the CSO are the most active presences in the social, cultural, environmental, human rights and gender equality areas.

² *Barometrul Opiniei Publice*, ianuarie 2007, IMAS București, p. 5 (*Public Opinion Barometer*, January 2007, IMAS Bucharest, p. 5).

		Foarte mult	Mult	Nici mult, nici puțin	Putin	Deloc	NȘ / NR
Gen	Male	8,1%	19,8%	37,0%	23,1%	11,3%	,7%
	Female	3,5%	14,3%	39,2%	25,7%	16,3%	,9%
Age	18-29 year old	4,1%	13,5%	40,3%	28,0%	13,6%	,6%
	30-44 year old	7,8%	17,2%	37,8%	22,9%	13,4%	1,0%
	45-59 year old	5,9%	19,7%	38,8%	24,0%	10,8%	,7%
	60+ year old	4,6%	18,1%	34,3%	22,1%	19,7%	1,2%
Residence	Urban	7,1%	18,2%	33,6%	23,6%	16,5%	1,0%
	Rural	4,6%	15,9%	41,6%	25,2%	12,0%	,7%
Nationality	Moldovean	5,6%	15,5%	39,9%	24,9%	13,5%	,7%
	Romanian	11,7%	32,9%	33,5%	17,8%	4,2%	,0%
	Rusian	2,6%	26,3%	27,6%	22,5%	18,3%	2,7%
	Ucrainean	8,9%	26,6%	28,3%	18,4%	16,4%	1,4%
	Găgăuz	2,3%	11,3%	38,8%	31,4%	16,2%	,0%
	Other	3,7%	5,8%	41,0%	29,2%	18,7%	1,7%
Education	Unfinished mandatory school	3,6%	8,9%	39,4%	22,9%	24,1%	1,1%
	Mandatory (12 years) or professional school	5,9%	14,9%	37,7%	27,6%	13,2%	,8%
	College	5,5%	20,9%	38,5%	23,5%	10,7%	,9%
	university	7,2%	25,7%	37,6%	20,9%	7,9%	,7%
Socio-economic level;	Low	3,9%	15,0%	39,9%	25,0%	15,0%	1,2%
	Medium	7,6%	18,6%	34,0%	24,9%	14,6%	,4%
	High	7,9%	20,6%	44,1%	20,3%	6,4%	,7%

The impact of state agencies on the development and/promotion of the co-operation

Cross-border cooperation is encouraged by the presence of bilateral or national documents that establish priorities, strategies (local, regional, national, and trans-national) and allocate resources.

According to those interviewed, the possibility these agencies have to influence collaboration is limited by the fact that they must adapt to the regional and national context, to policies, strategies and programmes negotiated / accepted / established at a wider level, most usually the EU.

Despite these limitations, agencies such as BRCT (the Regional Bureau for Cross-Border Cooperation) and programmes such as Phare have made several contributions to the development of cooperation:

V.2. Local perspectives on development and on relationships to the EU

There are differences in the way EU “aid” and “support” is perceived. In some responses coming from the rural environment one can find the idea that the EU must help improve infrastructure and living standards in general.

Besides, from the opinion barometers carried out in Romania before the accession, the Romanians' hopes were to live better after 1 January 2007, expecting some essential support from the EU.

In general, the perspective arising from the interviews and from press statements, on both sides of the case study, underlines a positive image, optimistic about the opportunities for local and regional development.

On the other hand, in the Republic of Moldova we have heard the phrase “good neighbourhood programmes”, not just “neighbourhood programmes”, which would support the interpretation that it is this positive potential for collaboration that is underlined here.

From some of the statements it follows that it would have been impossible to achieve so much without external financial support for social projects. Decentralization as policy has not been supported by financial measures, and therefore part of the problems were taken on and “solved” to a certain extent by CSO’s. The local public authorities work now on projects in partnership with CSO’s, and sometimes provide funding for local social projects. A representative of a CSO which has been working in the social area for almost 13 years stated that, without the involvement of the nongovernmental organisations, this sector would have been in a much worse situation.

In the Republic of Moldova, most of the projects aimed at social needs receive financial support from abroad (see the list of TACIS projects).

At the time being, the neighbourhood programmes have detected the need for promoting the cooperation at the two levels between partners from Romania and the Republic of Moldova. Here, some of the respondents from Romania – both from public and from private

institutions – consider they have an important contribution to the partnership with those in the Republic of Moldova, due to the experience they can share after past projects.

Among the priorities in financing cross-border cooperation programmes are mentioned both local development and social development.

Europe, in its geographic meaning as a continent, is considered more “inclusive” than as a group formed under the shape of the European Union.

Belonging to Europe supports the idea of Europeanness, seen as an expression of the slogan “unity in diversity”. Most CSO representatives on both sides of the river Prut assert that they are citizens of states belonging to the European map, with the difference that Romanians are now also European citizens. The meanings of the phrase “European citizen” are being debated, as are those of the word “Europeanness”.

Not all the CSO representatives see the EU as an organisation but as an “entity”. This angle on the EU, as an organisation, may be understood from some political declarations, whenever rules are imposed “because they come from Brussels” or because “they are imposed by the EU”.

From the point of view of “accessing the EU”, one CSO representative from Moldavia thought that most Moldavian citizens see the new EU border – now on the frontier with Romania – as an obstacle for crossing into Romania. This complaint is more frequent among those who used to supplement their income by selling products in Romania – products they used to transport themselves –; among those who came as tourists, of those who study in Romania and pay for their tuition (without a scholarship granted by the Romanian government).

The press materials published in the Republic of Moldova reveal at least two perspectives: the present stage is a favourable one, allowing a variety and a multitude of funding opportunities for projects and programmes; the second perspective is that of expectation for the recognition of their belonging to the European space.

Advantages and disadvantages are recognised on both “sides” of the case study. The representatives of Romanian CSOs would like more generous funding lines for social programmes. Many of them – especially those in border counties – have adapted to the new realities and expand

their projects beyond the Prut, through the CBC and neighbourhood programmes.

”In the general EU policy there is no “us” and “them”.” – declared the representative of Phare CBC in Iasi.

VI. Priorities and difficulties

VI.1. The role of and support for CSO’s cooperation in cross-border contexts

The CSO representatives consider the funding so far insufficient “compared to the potential the NGO-s in the area have in all domains”. (CSO RO). Sometimes the smooth running of a partnership is affected by political statements that are some reluctance in developing cross-border activities at the Romanian-Moldavian border.

One of the answers which sums up most of what is happening on both sides of the case study on the thematic focus was: “Yes, there have been changes, and there will be as long as the local authorities cannot find a permanent solution for co-funding the activity of civil society organisations and the latter depend entirely on topics/issues decided by external donors.” (CSO, Iasi, RO).

In general, partnerships are formed in order to carry out a project, which has to meet some requirements in order to receive funding, and one of these requirements is to have a partner across the border.

The partners are chosen depending on the institution's object of activity, on the project objective and on the organisations' ability to work together – proven in previous activities, on the basis of recommendations or following discussions during international/cross-border meetings.

One of the reasons for the project partners expressing preferences is the success of the project, depending on its specificity:

Simple projects have a cross-border effect, taking place mostly or exclusively on one side of the border but for the benefit of both partners.

In Complementary projects an activity on one side of the border is accompanied by a similar activity on the other side.

In integrated projects partners on either side of the border contribute different elements to a single project.

The answers given by the CSO representatives to this question tend to be: “we have not made an assessment from this point of view, thus it is too early for us to give an opinion”. And they continue: “as far as we are concerned, the activity is good” or “in its early stages”.

VI.2. The main obstacles to cross-border activities in the view of the CSO's

One representative of a Moldavian CSO focusing on promoting equal chances stated that the state institutions are involved in the process of cross-border cooperation, sometimes with negative effects: “the impossibility of obtaining visas on time has compromised the successful running of a project”.

In this respect, the representatives of the Romanian Ministry of Foreign Affairs admit the existence of difficulties in processing visa applications and in issuing visas for Moldavian citizens, the reasons given for these difficulties being the very large number of applications compared to the physical space in which the consular officers work in Chișinău. Both the desired – and in principle agreed-upon – consular offices in Cahul and Bălți, and the attempt to move the Romanian Consulate in Chișinău in a larger building were ultimately blocked by bureaucratic difficulties invoked by the Moldavian authorities.

Conclusions

As far as the relationship among the CSO-s is concerned, all those interviewed have collaborations with local and/or national CSO's. In recent years, the cooperation between the CSO's and the local public administration institutions has become a normal practice, being sometimes a pre-requisite for funding. Between the public and private institutions there should be some complementarities: the private organisations believe they have greater experience, initiative, independence, decision speed, grounding in reality and mobility, while the public institutions see themselves as having easier access to decision centres, and as more used to enduring the rigours of bureaucracy.

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EXPERIENCES MADE BY A GERMAN- ROMANIAN PROJECT IN THE CONTEXT OF THE SOCRATES AGREEMENT

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Abstract:

This workshop offers an opportunity for exchange of experiences in bilateral collaboration and a view in of possible future projects and strategies :

Based on the project: Reader: Best practise in Social work – Germany and Romania. Published, March 2007 we like to face the following questions for the workshop:

Is the textbook used at universities?

What are the experiences made by professors, by students and by qualified employees?

Are the German contributions helpful for teaching and in practice?

Which issues are missing in Romanian perspective?

To what extent is value orientation in Romanian social work important – in education and in practice?

How important are Christian values in current Romanian Social Work?

What is needed and useful for best practise – and can cooperation with German Social Work contribute to professional social work in Romania?

Do they need our experiences, could they be useful. What kind of cooperation designs are wanted?

Keywords: cooperation, Romania, social practice, mobility, universities

In the context of the 11th Biennial European ICSD Conference June 25-27, 2008 taking place in Iasi, Romania, with the issue: “European Societies in Transition – Social Development and Social Work” Ass. Prof. Dr. Ana Muntean (Universitatea de Vest din Timisoara/RO) and Prof. Dr. Juliane Sagebiel (Munich University of Applied Sciences, Department of Applied Social Sciences) offered a workshop. The workshop was based on the project: Reader: Best practice in Social work

– Germany and Romania, published by Polirom, Iasi, March 2007. This workshop offers an opportunity for exchange of experiences in bilateral collaboration and a prospect of possible future projects and strategies.

The book “Best practice in Social work – Germany and Romania” is the result of a now four-year co-operative relation (funded by EU Sokrates program) between the Universitatea de Vest din Timișoara, Faculty of Sociology and Psychology and the University of Applied Sciences Munich, Faculty of Social Work. The program is laid out as assistant professor mobility and student exchange. The first visits in Timișoara were filled with holding lectures and workshops for Romanian and with observing sittings in various social projects in Timișoara and the county. Expert interviews took place, also a stimulating, professional exchange of experience with the Romanian colleagues. Together the consideration was made how we could provide a wider professional audience with these experiences and how the knowledge and experiences could be transferred, with lasting effect, to Romanian and German students, to practitioners and to Social Work teachers and professors to secure sustainable teaching in Romania and Germany.

Thus the idea of this teaching and study book arose. But the way from the idea to the realisation was long, and we had to overcome quite some hurdles.

The first hurdle: to find authors

The first hurdle was to find colleagues in Romania who were ready to take part in the book project because we could not pay the authors any fees due to the lack of financial resources. Regarding the comparatively low salaries of the Romanian colleagues, this was a “bitter pill”. But the promise to publish their articles in both countries – in Germany and in Romania – won their enthusiasm.

To recruit German colleagues turned out to be another hurdle. Here, it was not the missing financial incentives rather than the lack of time capacity due to overloads from the university business. Our gratitude is dedicated to all authors who have written and made available their articles besides their professional duties and commitments.

The second hurdle was the conception of the book

The second hurdle was the original conception of the book. The basic idea was to compare current social problems in social work in both countries. Every article should contain a case representation, a description of theoretical knowledge and establish ethic values (pattern of society and conception of human being). It should further discuss methods and intervention for solving social problems. In this way common features and differences in the professional definition of social problems (the main focus) would have become obvious. Also the choice of epistemological and value knowledge and the way of interventions would have become clear.

That this idea only partly realised is on the one hand due to the fact that social problems as a challenge to social work are differently conceptualised in both countries. On the other hand, Romania and Germany show considerable differences in legislation, financial and organizational facilities of social services. To give a brief example, youth welfare (Jugendhilfe und Jugendarbeit), has not been established in Romania. Children under 18 years are seen and established in law as children in contrast with the long German tradition in youth work (Sozialpädagogik).

Child help and family care represent nowadays the main part of the social work in Romania. In this matter there is a clear backlog demand of psychosocial support for children and families since the toppling of the Ceausescu regime. Professional social work in Romania and Germany cannot truly be compared because the profession developed during quite different time horizons. In Romania, as the article of Ana Radulescu indicates, professional social work could develop not earlier than 1990 when the post-socialist era began. Furthermore, it could not link itself to any noteworthy national tradition apart from charity.

On the other hand, Germany looks back on a long tradition in developing professional social work. It started in the beginning of the 20th century with Alice Solomon. It continued with extension in professional education, theory formation, research and practice of social work accompanied by social legislation and building up social services. This development was interrupted in the Nazi period and after 1945 again reorganised and improved with American support. An established and diverse system of social welfare like the one in Germany cannot be

compared with one in the making like in Romania, which is moreover dependent on European specifications and financial support.

A third hurdle was financing

The Sokrates-Program finances professor mobility and student exchange, but not translation and printing expenditures for publications. The search for sponsors to cover translation costs, lecturing, printing for two editions, a Romanian and a German, represented the highest obstacle. Moreover, it was not easy to find capable translators considering our limited financial resources.

But as the book proves, we successfully overcame these hurdles. The realisation of the project was made possible by subsidies from the Bavarian parliament, from the University of Applied Sciences Munich, international office and department for public matters, from the Deutsche Verein für öffentliche und private Fürsorge, as well as from private sponsors. Here we would like to thank all sponsors for their unconventional and generous help and their confidence that a long-running project will come to a good end. Without them, the book would never have been completed.

The fourth hurdle was publishing the book in Germany.

After all the articles were translated into German, we tried to find a German publisher. This proved to be impossible, since all publishers declined with the argument that there was no market in Germany for a book about social work in Romania. Thus the book has so far only been published in Romania in the Romanian language.

Course of the workshop

The workshop itself turned out differently from our plans and expectations, since none of the Romanian colleges was able to attend. Thus the original questions couldn't be put to discussion. However, we got useful advice, as how to earlier and more effectively look for subsidies and how to reach a bigger public. We are thankful for these hints and will integrate them into our next project.

VALUES OF THE CONTEMPORARY ROMANIAN SOCIETY

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Abstract:

The process of arrangement of the values in the contemporary Romanian society is conflicting and confused. Taking into account my field of competence, I submit the problem of presenting our country through the so-called Brand campaigns. As other East-European nations (once controlled by a communist regime), Romania imitates the logos, logotypes, outdoor panels, icons, taglines, graphic signatures, etc. They prove to be a mere mimicry as well or less inspired variants of the European and American patterns. The first attempts to create a brand have been far away from the real Romanian specificity. Our country is included in the paradigm of the so-called holiday destinations (Malta, Greece, Cyprus, Spain, etc). Starting from such a simple and quite naïve approach, nobody can reach even the well-known definition of brand. We “sell” at a cheap price products all alike, including people, nations, countries and these are not bottles of soft drinks, cans, shoes, perfumes, etc. Traditions, spiritual value, uniqueness, all are absent, and there is no identity. We are confronted with “The Fall of Public Man” – the “public sphere” seems to lose, for the present moment, the capacity to understand/discuss/interpret with arguments and knowledge background the inter-subjective issue of “Who are we?”/“What do we stand for?” Television and other mass-media render real public contact unnecessary; also indulge in sentimentality losing the real values of personality. The public no longer knows how to use “the instruments” able to convey subtle, profound meanings. We are going to analyze some of the main components of the campaign for Sibiu as European Cultural Capital, and we suggest another kind of campaign taking into account the fact that the actual one for “IASI 600” is a very modest one. The possibility of having Iasi as a European Cultural Capital as well increases the necessity to discuss this aspect from another perspective. Iasi benefits from a richer historical and spiritual past than Sibiu. Its entire precious context was ruined during Ceausescu’s regime which is disregarded nowadays. We mention only a few of the negative factors that influenced the decline of the city: the poverty of the country in spite of the generous geographical and natural resources, the communist ideology and indoctrination, the greed of the present political class, the increasing ignorance of the young generation, the lack of respect for common sense rules, culture, tradition, civilization. When local (implicitly, national) identity is involved, proper components, illustrative mainly for the national spiritual connotations, must be used as attributes that reflect with inspiration and good faith the collective conscience, the essence of the Romanian national identity. These spiritual characteristics are more difficult to bring up,

but much more relevant from the perspective of rebuilding a public image and the inner sight of a nation, emphasizing the aspects regarding culture and civilization.

Keywords: brand, campaign, mimicry, specificity, spirituality

The process of arrangement of the values in the contemporary Romanian society is conflicting and confused. Taking into account my field of competence, I submit the problem of presenting our country through the so-called Brand campaigns. As other East-European nations (once controlled by a communist regime), Romania imitates the logos, logotypes, outdoor panels, icons, taglines, graphic signatures, etc. They prove to be mere mimicry as well or less inspired variants of the European and American patterns. The first attempts to create a brand have been far away from the real Romanian specificity. Our country is included in the paradigm of the so-called holiday destinations (Malta, Greece, Cyprus, Spain, etc). Starting from such a simple and quite naïve approach, nobody can reach even the well-known definition of brand. We “sell” products at a cheap price all alike, including people, nations, countries and these are not bottles of soft drinks, cans, shoes, perfumes, etc. Traditions, spiritual value, uniqueness, all are absent, and there is no identity. We are confronted with “The Fall of public man” – the “public sphere” seems to lose, for the present moment, the capacity to understand/discuss/interpret with arguments and knowledge background the inter-subjective issue of “Who are we?”/“What do we stand for?” Television and other mass-media render real public contact unnecessary; they also indulge in sentimentality losing the real values of personality. The public no longer knows how to use “the instruments” able to convey subtle, profound meanings. We are going to analyze some of the main components of the campaign for Sibiu as European Cultural Capital, and we suggest another kind of campaign taking into account the fact that the actual one for “IASI 600” is a very modest one. The possibility of having Iasi as a European Cultural Capital as well increases the necessity to discuss this aspect from another perspective. Iasi benefits from a richer historical and spiritual past than Sibiu. Its entire precious context was ruined during Ceausescu’s regime which is disregarded nowadays. We mention only a few of the negative factors that influenced the decline of the city: the poverty of the country in spite of the generous geographical and natural resources, the communist ideology and indoctrination, the greed of the present political class, the increasing ignorance of the young

Values of the Contemporary Romanian Society

generation, the lack of respect for common sense rules, culture, tradition, civilization. When local (implicitly, national) identity is involved, proper components, illustrative mainly for the national spiritual connotations, must be used as attributes that reflect with inspiration and good faith the collective conscience, the essence of the Romanian national identity. These spiritual characteristics are more difficult to bring up, but much more relevant from the perspective of rebuilding a public image and the inner sight of a nation, emphasizing the aspects regarding culture and civilization.

DECENTRALIZATION OF SOCIAL PROTECTION SYSTEM IN SERBIA

Natalija Perisic

Abstract:

The article presents the key-goals of the reforms in the Serbian social protection system that were motivated by the decentralization and deinstitutionalization of the previously highly centralized system. It also analyses a new Strategy of the Social Protection Development introduced in 2005. The main tasks are an active promoting of social cohesion and the European integration of Serbia. The integral part of this Strategy is provision of mechanism and arrangements of appropriate, cost-effective and implementation of established rights.

Keywords: decentralization, social protection system, social security, strategy on the social protection development

The social security system in Serbia consists of social insurance system (comprising of old-age and disability, health and unemployment insurance, child care system, protection of veterans and disabled veterans as well as the social protection system (Vukovic D., 1998: 95-96).

Until the 1990s, the social security system was predominantly characterized by extensive coverage of citizens and relatively high level benefits. Its roots have been Bismarckian, with the social insurance principles complemented by universalism, solidarity and mutuality in the system of social protection. However, the last decade of the previous century has been a period of comprehensive and deep social crises, with various unfavourable aspects and extremely severe consequences, in terms of constant decreasing living standards of the population. Commitments (and inabilities) of the economic and political systems to provide welfare and security for the citizens were transferred to the even weaker system of social security as well as families and their mechanisms of informal support. Therefore, this period presented an extremely huge challenge for the functioning of the social protection system. Unfortunately, the system itself was also in the crisis. Finally, „after one decade of crisis in Serbia, a period of reforms in social policy, which

related also to social protection reforms, started in 2000“ (Vukovic D., 2005: 262).

The social protection system is currently regulated by the Law on Social Protection and Social Security of Citizens, enacted in 1991. Even though various changes and amendments to this Law have been performed very frequently (almost every year) radical reforms of the system have not been introduced yet.

The Law on Social Protection and Social Security of Citizens provides for the following rights:

1. “Material assistance
2. Allowance for providing assistance and care to another person
3. Aid in gaining professional qualifications
4. Help at home, (the right to) daily centers, temporary accommodation in shelters and reception points, accommodation in institutions and other families
5. Social work services
6. Clothes needed for accommodation in social protection system or other family
7. Lump-sum financial assistance” (Law on Social Protection and Social Security of Citizens¹, Article 9)

The most important form of the state help to the poor, in the social protection system, is material assistance. It is a cash benefit for those citizens and their families who do not have enough funds to satisfy the basic life needs or who cannot satisfy them in any other way, except receiving the material assistance (Vukovic D., 2005: 277-278). According to data reported by the Ministry of Labour, Employment and Social Policy, there were 123.192 beneficiaries of this right in 2004.

¹ Law on Social Protection and Social Security of Citizens, “Official Gazette of the Republic of Serbia”, No. 36/91, 79/97, 33/93, 53/93, 67/93, 46/94, 48/94, 52/96, 29/01, 84/04.

Table 1

The trend of the number of users of the right to material assistance

Years	1999	2000	2001	2002	2003	2004	March 2005
Number of families	31.409	30.736	37.714	38.797	45.797	47.354	51.065
Number of users	67.352	66.560	85.121	88.483	107.873	123.192	127.887

Source: The Ministry of Labour, Employment and Social Policy, 2006

However, the number of the poor in Serbia is much higher than the number of users of material assistance. In 2002, there were about 800,000 people (10.6% of the total population) below the national poverty line, with consumption (per equivalent adult) of less than 2.4 USD per day. However, a shift in the poverty line from 2.4 USD to 2.9 USD per day increased the number of people defined as poor in Serbia, to 1,600,000 (474,000 households), i.e. to 20% of the total population. The analysis did not fully include refugees and internally displaced persons, nor Roma who are the most vulnerable (Poverty Reduction Strategy, 2003: 2).

Not only the data about the number of absolutely poor and the number of beneficiaries show the disparities between the real needs of the population and their coverage by the social protection system. It is also evident, regarding other rights from the social protection system, that they do not enable real and sustainable solutions for the beneficiaries.

Table 2

Number of users of the various rights in the social protection system

Years	Material assistance	Allowance for providing assistance and care to another person	Accommodation in social protection institution	Aid in gaining professional qualifications	Total rights
1993	132.073	17.229	20.855	712	170.869
2004	123.192	23.352	17.200	650	164.394

Source: The Ministry of Labour, Employment and Social Policy, 2006

Current level of decentralization in the social protection system

The social protection system presents a mix of centralized and decentralized elements, „depending on criteria observed. In terms of the eligibility criteria and benefits' amount (huge differences between developed and underdeveloped regions, i.e. municipalities, due to differences in average salaries), as well as well developed nets of social protection institutions which control the field and make decisions about eligibility and the social protection system is to a high extent decentralized. On the other hand, funding sources are highly centralized (the Republic budget)“ (Bogicevic B., Krstic G. and Mijatovic B., 2002: 67). Also, regarding the existing decentralization, its levels differ in certain areas.

Delegation, as a form of decentralization which means that certain activities are transferred from the central to the local level, can be found in the field of child allowances, as well as in the field of rights for the disabled veterans. The municipalities collect the data and documents necessary for the effectuation of these rights. These documents and all regulations are set by the central level which also funds these rights.

Here the municipalities do not have discretion rights, even though they can formulate some additional. Many municipalities, especially in Vojvodina, introduced additional rights to cash benefit the first child (which is omitted by the current law), and in Belgrade, disabled veterans have subsidies, regarding the payment of costs for the utilities.

Deconcentration, which means transferring of certain activities and competencies from the Ministry or national services, to organizations sector on the local level,. It exists partially in the field of the right to material assistance and allowance for providing assistance and care to another person. The Centres for Social Work on the municipal level, collect the documentation and issue decisions for these rights. At the same time, they have limited discretion authorizations. The rights and necessary documentation are defined on the central level, and the payments are disbursed from the Republic funds (Begovic B, Vacic Z., Matkovic G., Mijatovic B., 2006: 65).

Previously existing decentralized criteria regarding the amount of state help to officially poor were changed in 1991. Namely, the amount of material assistance was dependant on the average salary in a municipality. Waiving this criteria was based on several arguments. The first was that the data about the level of average salaries in the

municipalities were not relevant and real indicators of the living standard, partially due to omissions in the statistics. The other argument was that the amounts and census for this right had been defined at extremely low level, and that therefore even the most basic needs of beneficiaries could not be satisfied. In practice, there were almost no differences in the amount of material assistance between the municipalities (Vujosevic M., 2005: 13). However, a shift from decentralized to centralized criteria was motivated by the necessity of equal availability of this right to all citizens, regardless of their living conditions in a concrete municipality.

Devolution, the highest level of decentralization, in which the municipalities are entitled to take decisions, to finance the rights and to manage the system independently and exists in some parts of the system of social protection in Serbia. The municipalities do not only establish and finance the right to stay in daily centres, clothes for beneficiaries going to the institutions and other families but also provides lump-sum financial assistance and temporary accommodation in shelters and reception points². The amount of lump-sum financial assistance is limited so that it cannot be higher than the average salary in the Republic, but can be paid out to one beneficiary several times. Municipalities are entitled to precise the definitions and conditions for this right (Vukovic D, 2005: 277).

The Law also prescribes that the municipalities can establish some other rights in the field of social protection, as well as wider scope of existing rights and more favourable conditions for their effectuation which depends on the funds available within the municipalities. The majority of municipalities give special discounts to beneficiaries of material assistance, regarding paying the utilities, etc.

Inclusion of NGOs in the domain of social services¹ rendering in Serbia is also present. During the second half of the 1990s, NGOs were primarily dealing with providing humanitarian aid to refugees, displaced people and vulnerable local inhabitants. Gradually, more and more local NGOs started to provide the services which were missing in the state social protection, such as SOS telephones, shelters for victims of trafficking and family violence, services of legal support for refugees, etc.

In Serbia there exist two Funds, which are very important for the further development of the decentralization process in the field of social protection (Begovic B. et al., 2006: 68). These are the Fund for Social

² These rights are not denoted by the Law on Social Protection and Social Security of Citizens as of general interest.

Innovations and the Fund for the Financing of the Organizations for the Disabled. Their importance is primarily due to their orientation towards the local level and encouraging the local specifics and priorities. These Funds enable gradual introduction of new services in certain local communities, pursuant to local needs and priorities³.

The mechanisms employed by these Funds contribute to decentralization by means of strengthening the capacities of the local communities and encouraging the partnership relations between various actors on the local level⁴.

The additional strong impulse for decentralization is also the deinstitutionalization process. It is mainly realized through various projects of foster care and transformation of institutions on the local level.

Participation of private sector and financing the services by the beneficiaries, as one kind of decentralization is present mainly in the field of homes for the elderly.

Future directions set by the Strategy of Social Protection System Development

Main deficiencies of the current system of social protection are the following:

1. position of citizens and users in the system is extremely passive
2. social services network is not sufficiently developed
3. services rendered by NGOs are also underdeveloped and they are not used enough
4. institutions and services in the social protection system are centralized, and they are not flexible (The Strategy of Social Protection System Development, 2005: 4).

³ For example, there are municipalities with predominantly old population and they need to improve the services directed to elderly, such as allowance for providing assistance and care to another person. Some other municipalities have many refugees and they need, for example, to help those people to adapt to new circumstances and so on. Furthermore, municipalities can disseminate their experience and knowledge, regarding the projects they have participated in, serving thus as some kind of good practice for the others.

⁴ They favour those projects including joint activities and project implementation by NGOs and state sector.

Therefore, decentralization, along with development of more efficient material services as well as provision of high-quality support services is seen as one of the **strategic directions** in the development and transformation of social services system (The Strategy of Social Protection System Development, 2005: 8-14).

The Strategy of Social Protection System Development provides for the cash benefits and services should be developed in the following way:

Regarding the cash benefits - The Republic level should prescribe only minimal rights for the beneficiaries. Minimal rights would be considered those which enable the citizens to meet their basic needs. These rights must be equally available to all citizens in the Republic and the system must be flexible. This means that the funds would be on the local level and the state would grant additional funds only to those municipalities which do not have enough funds. The laws should provide the mechanism enabling the local communities to dedicate a certain range of funds for the social needs of their citizens, and also to deprive them if they misuse the funds. (Vujosevic M., 2005: 14; Vujosevic M., 2006: 24).

Material services rendered to the beneficiaries need to enable them, at least, the basic minimum for a living. Therefore, the activities must be taken, regarding:

- provision of material security for the most vulnerable groups of citizens, who cannot, due to their psycho-physical conditions provide a basic minimum for themselves and who do not have families nor relatives who can support them
- directing funds for the social protection system towards the employment of citizens capable of work, i.e. creation of conditions for the activation of their potentials
- integration of all municipal services, performing the tasks regarding the effectuation of these rights (The Strategy of Social Protection System Development: 2005: 12).

At the same time, the Strategy establishes that the national employment offices are obliged to develop programs of subsidized employment of partially or wholly capable of work beneficiaries on public works. Ideally, the overall objective would be to support the beneficiaries to be independent in relation to the system, and thus prevention their stigmatization, marginalization and social exclusion.

Regarding the services - Services, the performance of which is considered inadequate⁵ by the local communities to be organized on the local level, can be organized in cooperation with other municipalities on the Republic level. On the Republic level, only certain, very limited number of highly specialized services should exist. They would be paid by a local community, the citizen of which uses the specific services on the Republic level (Vujosevic M., 2006: 25). This method of funding requires from the municipalities to develop various, available services which are at the same time better and cheaper for their citizens, and to use highly structured services (those on the Republic level) only when it is necessary.

In terms of services in general, the basic principle must be that the decentralization cannot jeopardize minimal standards or result in huge disparities in the quality of services rendered between the various local communities.

That means that not all services should be decentralized, especially not those regarding the accommodation of beneficiaries in the social protection institutions. For example, Homes for the accommodation of children and people with mental disturbances should stay within the state competency since their locking into the local frames would result in decreased availability of these services.

On the other hand, decentralization should be encouraged in the area strengthening the foster care and daily centers for people with special needs. The Projects for the development of foster care and very active campaign of foster care popularization resulted in application of 1500 potential foster families. At the same time, the Homes for children are in the process of transformation into Centres of foster care. Those centres would be responsible for providing professional help, education for foster parents and supervision of foster families. The other alternative is to transform them into daily centres for the stay of children with special needs, shelters for temporary accommodation for victims of family violence, etc.

In the field, successful decentralization would include:

- “Encouraging of development of various social services in the communities and inclusion of many various actors in the sphere of rendering service

⁵ due to very small number of (potential) users, for example.

- Introduction of new services in the system of social protection within the existing institutions and services
- Support and affirmation of a family as the best framework for the protection of vulnerable groups and encouraging forms of fostering, adoption, daily centers, aid at home and other similar services
- Creation of standards and promotion of the quality of services rendered
- Definition and connection of services from the various sectors and sub-systems in all levels
- Introduction of efficient system of complaints” (The Strategy of Social Protection System Development: 2005: 13).

Challenges and limits

In order to be effective and efficient, decentralization requires certain prerequisites in terms of:

- democratization, transparency and control mechanisms.

Decentralization can have positive effects only if it is connected with democratic processes. That means that the local communities are responsible towards the citizens and that this responsibility can be “checked” by the citizens. That means that they are transparent and that the citizens can have access to local budgets, that they know purposes of their spending, and that they have information

- capacities on the local level necessary to support the decentralization.

With the higher level of decentralization, the local communities must fulfill higher demands. This process requires capacities for its implementation.

- development of civil society and empowerment of vulnerable groups.

It is very difficult to get the participation of vulnerable groups. Civil society plays a very important role in the inclusion of beneficiaries.

- adequate financial resources and sources.

There are huge differences between the municipalities, in terms of their economic capacities and strengths. Furthermore, „according to data collected during interviews in 30 local communities, the municipalities in Serbia in 2004, spent less than 2% of their budget⁶ for social protection“ (Begovic B., 2006: 67). Only 25% of municipalities spent more than 5% of their budgets for social protection (Stanisavljevic I., 2006, 27).

Decentralization of social protection (and not only of social protection, but also of other fields connected with the system of social protection⁷) also requires clear formulation of services which can be transferred to private sectors, definition of standards for certain services, licensing, development of control and supervisory functions on the local level, certain knowledge of local communities, etc.

It is dependant on the cooperation between the sub-systems; „taking measures in the various sub-systems within the same conceptual, strategic and time framework; clear mandate and field of action in terms of the social protection improvement; experience exchange and knowledge transfer; periodical evaluations of their activities; development of capacities for the realization of activities“ (Vujosevic M., 2006: 22).

Currently, applicable Laws entitle and obligate the local communities to meet the social protection needs of their citizens. However, the competencies at local level are not prescribed in detail, creating thus many gaps in practice. Due to lack of financial resources (apart from the concentration of the funds on the Republic level), and other actual obstacles⁸, “the services of social protection on the local level are underdeveloped” (Begovic B. et al., 2006: 67).

⁶ Budgets of municipalities are different too.

⁷ health care, education, employment, housing, judicial system, civil society, information

⁸ Local communities are not independent enough and they are not motivated to develop various services. Absence of variety of services leads to usage of existing forms of protection financed by the Republic. Not only that these services are the most expensive, but also other programs and support services for individuals and families are not sufficiently developed (for example it is an accommodation into an institution in those situations in which the need can be satisfied in a family environment).

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A SNAPSHOT ON MINORITIES' STRUGGLE AND INTEGRATION IN THE U.S. SOCIETY. LESSONS LEARNED

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Abstract:

The United States is often considered to be “a country of immigrants” around the world. Reactions to waves of immigrants coming to U.S. differed over time, but they all started in the same way, with more or less acceptance. Some groups struggled for many years to be considered equal while others easily gained acceptance.

Although it is a diverse country overall, the integration process differed from group to group of immigrants, and has gone through many phases (from using slaves to work on the farms to currently having minorities in the highest level of government). Americans had to learn many lessons in the process of integrating minorities and giving them equal rights. In addition there is still much progress to be made. This paper will focus on presenting: 1) the way minorities (using the examples of African-Americans, Hispanics and Refugees) organized themselves to fight for their own rights (through advocacy, lobbying, public speeches, church leaders) and 2) the way society responded to their actions. While racism is still prevalent in the society, this paper will focus mainly on the gains, models used, changes in policy, and their results, as a point of reference for other societies who struggle to integrate their minorities and thus give a voice to the voiceless.

Keywords: minorities, integration, U.S.

Introduction

The United States (U.S.) is often compared to a ‘melting pot’. A ‘melting pot’ represents the integration of different races and cultures to make a homogeneous group of people in the U.S., who all live and have equal rights and the opportunity to accomplish their dreams. There is a debate whether the reality of a ‘melting pot’ has been accomplished. Some minority groups continue to struggle for integration and disagree with the concept of the ‘melting pot’.

For some groups of people, the dream was to be treated equally regardless of the color of skin, language used, gender or educational background. For others the dream was to accomplish a better life in

financial terms. In the past integration was the American dream for many minority groups in the U.S. Was the dream of equal rights and equal opportunities accomplished? If yes, how was it done? What was the difference among minority groups that allowed easier acceptance and integration? What were the strategies used to attain the goal of integration in a capitalistic world? Although some accomplishments have been done, the integration of groups of immigrants is an ongoing process for certain minority groups in the U.S. Some of these groups have attained a degree of equality while others are still struggling for it. African-Americans have struggled long and hard for what little equality they have achieved, while Hispanic-Americans are currently struggling against large scale discrimination, and Asians gained the most acceptance.

Minority groups in U.S.

The diversity of minority groups in the US include racial minorities (e.g. Asians, African-Americans, and Hispanics/Latinos), ethnic minorities (e.g. Italians, Germans, Irish, Canadians), and religious minorities (e.g. Orthodoxies, Muslims, Buddhists, Amish). In addition, there are social minority groups like older adults, women, children, lesbian, gay, transgender and bisexual (LGBT). A minority group is defined by the Urban Dictionary as being an ethnic, religious, or other group having a distinctive presence in the society and little power or representation relative to other groups within the society.

Schaefer (1993) identifies four characteristics of minority groups: a) a subordinate group who has less power over their lives compared with other majority groups, b) are not limited by numbers (e.g. women are more in number than men, but have less power), c) interchangeable with subordinate group, d) a group with less opportunities (education, wealth, etc.) than other groups.

Currently, the minority population of the U.S. represents 34% of the total of 301.6 million. Hispanics currently comprise the largest minority group totaling 45.5 million, followed by blacks or African-Americans (40.7 million). Blacks or African-Americans are followed by Asians (15.2 million), American Indians and Alaska Natives (4.5 million), and Native Hawaiians and Pacific Islanders (1 million) (U.S. Census Bureau, 2008).

The process of integration is not only equal access and equal rights but also the perception of being accepted by the residents of the country

and is not only a process for the newcomers but also for the receiving community (Fix, 2007). Due to many reasons, some minority groups form their own subcultures within the society and maintain their own ethnic characteristics without fully accepting the receiving community (Ableby, 2001).

Integration policy was more or less regulated in the past, taking two different forms: a) one encouraged integration by a variety of programs (started when Eastern and Southern Europeans arrived in the U.S.) and the second was b) a laissez faire policy of non-intervention, which forced immigrants to rely on their own self-determination and the ability of the market to offer them jobs (Jimenez, 2007). The last one was more prevalent in the last years in U.S. than intentional integration programs. But in the day to day life, the factors that make a difference in being more or less integrated in the U.S society are: the English language skills, education and nationality.

Immigration policy and integration programs are in place for the approximately 12 percent foreign born population of the US (in 2006). (The foreign born population is considered as being part of the minority group). This percentage varies from state to state, some states having higher rates than others. For more details about the top five states with the highest percentage of foreign born persons, see the following figure:

Figure 1
States with the highest percentage of foreign born persons in 2006

	State	Percent
1.	California	27.2
2.	New York	21.6
3.	New Jersey	20.1
4.	Nevada	19.1
5.	Florida	18.9

(Source: U.S. Census Bureau, 2006)

Social workers have a tremendous role in assisting the newcomers by empowering them and fighting for their rights. Social workers have been trained to have the skills, empathy and professionalism in helping newcomers/minorities integrate into the receiving society. More than that,

they are bound by a code of ethics to provide services to any individual regardless of their race, nationality, sex or age. Part of the Code of Ethics says:

„Social workers promote social justice and social change with and on behalf of clients. "Clients" is used inclusively to refer to individuals, families, groups, organizations, and communities. Social workers are sensitive to cultural and ethnic diversity and strive to end discrimination, oppression, poverty, and other forms of social injustice. These activities may be in the form of direct practice, community organizing, supervision, consultation, administration, advocacy, social and political action, policy development and implementation, education, and research and evaluation. Social workers seek to enhance the capacity of people to address their own needs. Social workers also seek to promote the responsiveness of organizations, communities, and other social institutions to individuals' needs and social problems” (NASW, Code of Ethics).

A History of the Struggle to Integrate African-Americans in the U.S.

The U.S. was first discovered in 1492 by Europeans and was a former British colony. Slavery was used for many years as a form of involuntary labor to build the country. Africans were brought to the U.S. by boat in abominable conditions and then used to work for European Americans. According to Marable & Mullings (2002) “It was a brutal business: the separation of families, the division of children from parents, the branding of human beings with hot pokers, like livestock; the use of the whip and other methods to discipline to impose fear; the deliberate use of rape as an act to terrorize women and men alike” (p.12). After many years of imposed slavery and then followed by the abolition, African-Americans started the fight for their human and civil rights, named the Civil Right Movement.

A short chronology of African-Americans struggle for integration in U.S. can be seen in Figure 2.

Figure 2

Short chronology of African-Americans struggle for integration between 1619 and 2001

1619	<p>1857</p> <p>The U.S. Supreme Court declares that African Americans are not U.S. citizens and have no rights that white men are bound to respect</p>	<p>1861</p> <p>The Civil War begins (on issue of slavery)</p>	<p>1867-1870s</p> <p>During the Reconstruction in the South, black male suffrage is granted and several African-Americans are elected to state legislature and the U.S. Congress.</p>
<p>1875</p> <p>Congress pass the Civil Rights (all persons in the U.S. are entitled to the full and equal enjoyment)</p>	<p>1883</p> <p>The court overturns the Civil Act</p>	<p>1896</p> <p>The Supreme Court rules that railroads shall provide "separate but equal" accommodation</p>	<p>1919</p> <p>The "Red Summer", when 25 race riots break out in U.S. Lynching and attacks on blacks by white people were rampant.</p>

1936	1941	1954	1956
Hundreds of black organizations establish the National Negro Congress.	The first march followed by the President Roosevelt signing the Executive Order 8802 establishing the Fair Employment Practices Committee.	The Supreme Court rules segregation of schools as unconstitutional.	The first black student admitted at the University of Alabama withdraws from school after days of rioting by white students.
1962	1968	1985	2001
The U.S Supreme Court orders the admission of a black student to the University of Mississippi and federal troops escort him to class.	Martin Luther King is assassinated in Memphis.	Anti-apartheid protest rallies gain momentum in U.S. history.	Colin Powell becomes the first African-American to be appointed U.S. Secretary of State.

(Source: Marable, & Mullings, 2002)

Racism has been in place toward African-Americans since they were forced to come here as slaves, and its roots are still in place among the society. Slavery was abolished by President Lincoln but racism and segregation is still harder to combat. Naylor (1997) asserts that what produces racism is “attributing social or cultural skills and capabilities to groups based on physical characteristics” (p. 50). African-Americans guided by strong leaders were empowered to oppose segregation. One of these leaders , Booker T. Washington (1856-1915) an educated African American was mentored by the great abolitionist Samuel Armstrong

(Edwards, 2006). Washington founded the Tuskegee Institute, the first University for African Americans which is known for its academic rigor. Many important businessmen and even Presidents consulted him on race related issues (Edwards, 2006). Washington's strategy of improving the situation for African-Americans took into consideration the unique place that African-Americans had in the society while working to economically improve the situation which was called economic accommodation. Washington stated that "blacks should basically accept a subordinate position in society while quietly and slowly beginning to improve their position and status by an economic route through filling a niche that whites would accept as non-threatening" (Lemay, 2000, p. 106). He also believed that blacks should remain in the South, work as farmers, preachers or blacksmiths, yet also continue to get an education.

African-Americans have risen from severe oppression as slaves to people without civil rights, then to having civil rights but not human rights, and to finally achieving some degree of acceptance as equal and having more economic, social and political rights. The struggle for integration took a wide range of forms from violent riots to nonviolent sit-ins, conferences, marches, associations, and a report to the United Nations, among others. During the Civil Rights Movement there were a series of rallies, one summer being filled with so many rallies (25) that it was named "the red summer." All of these efforts were toward a single goal: integration. African-Americans' joined together to react quickly to inequalities and fight against them. Together African-Americans advocated for their economic, social and political rights (beginning with the right to vote).

Another important African-American leader was Martin Luther King (1929-1968) who was a Baptist pastor and a Civil Rights activist in the Southern U.S., during the time of segregation. Dr. King became well known nationwide when he successfully orchestrated the Montgomery Bus Boycott in 1956, which discontinued the practice of African-Americans being forced to sit in the back of the bus. The following year he established the Southern Christian Leadership Conference. Dr. King became an nationally important civil rights spokesman (Carson, Armstrong, Carson, Cook, & Englander, 2008). During his lifetime Dr. King used a variety of methods to advance the goal of civil rights. These ranged from strikes (e.g. Memphis Sanitation Workers' Strike), rides, marches (e.g. the March on Washington for Jobs and Freedom, 1963 –

more than 200,000 people attended), conferences, freedom prayers, rebellions (Watts Rebellion, 1965), rallies, and campaigns (Poor People's Campaign 1967-1968), where thousands of racially mixed people participated. Dr. King even traveled to India and Ghana to learn and support the ideology of nonviolent resistance as a strategy to fight racism. He is famous for many of his inspiring speeches: "Beyond Vietnam", "Drum Major Instinct", "Holt Street Baptist Church", "I have a Dream", and "I've been to the Mountaintop"

Dr. King used a strategy of nonviolent direct action. He collaborated with different groups such as black freedom groups, interracial groups (e.g. Congress of Racial Equality founded in 1942), important individuals (e.g. Eleanor Roosevelt), and churches. Dr. King's speeches were influenced by his Christian background and he often referenced the Bible to demonstrate his model to create an equal society. The most famous speech he gave was "I have a dream" in 1963. In this, he said: "I have a dream...I have a dream this afternoon...that justice will roll down like waters, and righteousness like a mighty stream...every valley shall be exalted and every hill and mountain shall be made low...when all of God's children, black men and white men, Jews and Gentiles, Protestants and Catholics, will be able to join hands and sing with the Negroes in the spiritual of old: Free at last! Free at last! Thank God Almighty, we are free at last!" (King, "I Have a Dream," 1973 in Carson et al., 2008). In 1968 he gave his last speech "I've Been to the Mountaintop", with less than 24 hours before his assassination. He stated: "We've got some difficult days ahead. But it really doesn't matter with me now, because I've been to the mountaintop...I've seen the Promised Land. I may not get there with you. But I want you to know tonight, that we, as a people, will get to the Promised Land" (King, "I've Been", 222-223 in Carson et al., 2008). In addition, Dr. King was awarded the Nobel Peace Prize in 1964 for his tireless efforts for integration and equality for all citizens of the United States along with other great recognitions.

Dr. King's strategy reached out to all levels in the society. He diligently worked to organize the average individuals to the President of the United States J.F. Kennedy (Carson, 1998) to stand together for civil rights on all levels from the economic level to the social and political level.

Even with all these efforts, African Americans still have a higher unemployment rate than other racial groups, which shows how far this

group has to go to achieve parity. They still represent the majority of the population who accesses the social services available, and they also are about half of those incarcerated, even if they represent only about 12 percent of the population of the U.S. The following table details unemployment rates by race in the US:

Table 1
Unemployment rate by race (one race), 2006

Race	Total	In labor force	Employed	Unemployed
White	177,338,338	65.0%	61.1%	5.3%
African-American	27,452,330	62.9%	54.6%	12.6%
American Indian or Alaska Native	1,779,262	59.6%	52.0%	12.0%
Asian	10,517,576	65.7%	62.1%	5.1%
Native Hawaiian and Other Pacific Islander	323,418	68.9%	62.1%	8.0%
Hispanic or Latino origin	30,741,044	68.1%	62.7%	7.5%

(Source: U.S. Census Bureau, Employment status, 2006)

African-Americans' efforts to gain equality continue, but did help to increase the society's acceptance of diversity. In the end the civil right's movement of the 60's and 70's increased consciousness of diversity and started an ongoing dialogue that continues today. These efforts have helped to open the door to future immigrants who are also minorities in this country. By law, equal opportunities (social integration, political participation and economic development) are in place for everyone and the work continues at all levels for full integration.

A history of integration of Hispanics/Latinos in the U.S.

Hispanics now represent the largest minority group in U.S. The following groups classify as people of Hispanic/Latino descent: Mexican, Puerto Rican, Cuban, Dominican, Central American, and South Americans (U.S. Census Bureau). Mexican-Americans comprise the

largest percentage of Hispanics/Latinos with approximately 28 million out of the 44 million in 2006 (U.S. Census Bureau, 2006). Due to changing immigration policies in the mid-1950's, immigration in the US shifted from mostly European to Central and South America and Asian countries (Lemay, 2000).

The Hispanic population in the U.S. faces economic, social and political challenges. Some of the reasons why the economic rates are low for this population are represented by the low level of English acquisition, the educational and occupational background, and the high percentage of undocumented persons in U.S. who do not have a legal status in the country and therefore are easily exploited. The three top problems this population currently faces are low levels of education, employment abuse and lack of access to healthcare (Butler, Elliot, & Gunther, 2001).

The relationship between Mexico and the U.S. was affected by the American-Mexican war in 1848, when Mexico lost approximately 45 percent of its land (Lemay, 2000). Since then a large percentage of Mexican-Americans live in the Southern U.S. and due to worsening economic conditions in Mexico many have immigrated illegally to the US.

Due to the effort to integrate and offer equal opportunities to every person in the US (documented or undocumented), the response has been to increase the number of bilingual programs to overcome the language barrier that many immigrants experience. Since Hispanics/Latinos are such a large number many programs specifically target Spanish speakers. Many non-profit organizations sponsored by government grants offer both English and Spanish classes. Also, in certain areas, in order to obtain certain jobs a person must be bilingual in English and Spanish. Even with all these programs offered some Hispanics have resisted integration. Lemay (2000) identifies three factors that may have prevented Hispanics to fully integrate: a) their pride in their Mexican culture, heritage and language; b) poor education; and c) racial bias (about 40 percent being full-blooded Indians and almost all having some Indian blood). Compared to U.S. Caucasian population, Mexican-Americans are usually young, with a median family income lower than average, and are less educated with a higher unemployment rate (Appleby, et. al, 2001).

The Hispanic population in the U.S. (60% Mexican) advocate for the right to keep their native language. One of the stereotypes that exist in

the U.S. society about the Hispanic population is that Hispanics don't want to learn English. Some say that this leads to discrimination against this population:

“It is crucial to remember that not all foreign accents, but only accent linked to skin that isn't white, or which signals a third-world homeland, that evokes...negative reactions. There are no documented cases of native speakers of Swedish or Dutch, or Gaelic being turned away from jobs because of communication difficulties, although these adult speakers face the same challenge as native speakers of Spanish” (Lippi-Green 1997, p. 238-39, in Cobas & Feagin, 2008).

Hispanics' struggle is mainly about immigration and language issues. Even though Americans' proclaim that the U.S. society accepts everyone and even offers help to integrate, the society still demands that all immigrants need to learn the English language. The U.S. society is not agreeable to the idea of becoming bilingual. English language skill is essential for immigrants to gain integration. The longer an immigrant stays in the U.S., the demands from the society to learn English and become integrated increase. This is because it is assumed that the immigrants will not be able to accomplish “the American dream” if they are not proficient in English. If immigrants do not have English language skills they are susceptible to abuse and mistreatment from employers, landlords and are isolated within the society. However, many Hispanics retain their right to speak their own language and not be assimilated into the U.S. culture. This difference in ideology is a point of tension between the many Americans and Hispanics.

Hispanics have used a wide variety of methods to gain equal access in the US society. The main strategies used were: strikes (the purpose to oppose deportation of undocumented immigrants), lobbying Congress on immigration issues, outreach to churches for support, coordinating with human rights groups, social advocates, environmentalists, tax-payer groups and pro-family advocates (Wong, 2006). The most effective method was lobbying Congress. Lobbying in U.S. is defined as “any action designed to influence the actions of the institutions of government. That means it covers all parts of central and local government and other public bodies...its scope includes legislation, regulatory and policy decisions, and negotiations...” (Miller in Thomson, & John, 2007, p. 3)

Hispanics/Latinos are currently represented in the House (through the Hispanic Congressional Caucus) and are able to have a great

influence on immigration policy issues among others. Cities that have high Hispanic populations are heavily represented in the local government by Hispanic leaders (Lemay, 2000).

A History of Refugees' Integration in the U.S.

Since the U.S. signed the Geneva Convention and then the Refugee Act of 1980, it began to accept large numbers of refugees into the U.S. A refugee as defined by the United Nations High Commissioner of Refugees (UNHCR) is "a person who owing to a well-founded fear of being persecuted for reasons of race, religion, nationality, membership of a particular social group, or political opinion, is outside the country of their nationality, and is unable to or, owing to such a fear, is unwilling to avail himself of the protection of that country".

Approximately 50,000 refugees are granted refugee status each year. They represent about 10% of the US national immigrant population (Singer & Wilson, 2007). The resettlement agencies are funded by the U.S. Department of State and they offer social support and financial support in the amount of \$420 a month per person, food stamps and health insurance (Medicaid). In addition, the resettlement agencies offer a variety of programs to help integrate refugees in the society. These programs include: help to find housing, employment assistance, help filing in taxes forms, immigration processing, English and computers classes. After a year in the U.S., refugees are eligible for permanent residency and do not have to leave the country.

In the state of Georgia, refugees are resettled together so that they can help support each other through this process and will have some sense of community. Also, this is because the resettlement agencies are required to place them to live within 100 miles from the agency. This is helpful because often refugees do not have transportation when they first come to the US and must be able to get to the refugee resettlement office. This requirement has created several large communities of refugees living all together. Refugees have almost all the rights of citizens including, driver's license, work permit, and free schooling for the children, except for the right to vote. The main responsibility for including refugees in the U.S. society is carried by the resettlement agencies that often times have lack sufficient funding and rely on volunteers for many of their needs. And even so, their support ends once the refugees find employment. Due to the need for continuous support in integrating them, a few voluntary

agencies developed and continue the process of integration and support once the resettlement agencies focus on the newly arrived refugees.

At the state level, some states have better programs to integrate refugees and fight for their rights than others (e.g. The Immigrant Coalition for Immigrant and Refugees Rights). When signing the Order, the Illinois governor stated:

“In November 2005, I signed a landmark New Americans Executive Order to help hard working immigrants successfully integrate into the American and Illinois way of life. The executive order called for a coherent, strategic, and proactive approach from state government and community organizations, working together to integrate the rapidly growing immigrant population in Illinois. ...to develop a new approach to immigrant integration, including issues such as citizenship, learning English, improving education, expanding healthcare, and accessing human services.” (Rod R. Blagojevich, Governor Chicago Illinois, cited in *For the Benefit of All*)

In the U.S., refugees have many challenges including finding good jobs, especially for educated professionals. Because the U.S. system does not easily recognize licenses and degrees from other countries, refugees are often forced into manual labor jobs or are forced to go back to school (Schneider, 1994).

It has been identified lately that refugees fleeing war zones are in great need for mental health programs to help them overcome the trauma and often suffer posttraumatic stress distress. Due to the lack of funding, many resettlement agencies do not provide counseling to their clients, or they do refer them to a facility in the community, leaving the decision up to them. Along with these challenges there is an additional factor identified by mental health professionals, and this is that the psychotherapy profession must shift the focus to include the entire family and its culture, rather than applying the same treatment and therapy to everyone (Weine, 2002). Some professional still do individual counselling in cases where family counselling is mostly needed.

In the state of Georgia, many refugees (after integrating into the society and learning to speak the language well) took leading positions in resettlement agencies to implement policies or prevent policies that affect them directly. In Georgia, these organizations have formed a coalition that work together to advocate for policy change for refugees.

Much of this process is through lobbying the state Congress. The coalition works both on education of the public about refugee issues through forums and conferences but also directly lobby political leaders. In addition, the coalition proposes new legislation with the help of supportive politicians. Local community leaders (lawyers, directors or organizations) work with the coalition to bring new ideas about how to work with and integrate refugees. The challenges refugees are exposed to are related mostly to the lack of transportation, English skills, and discrimination based on their race or religious affiliation.

Conclusion

Racial and ethnic minorities in U.S have learned over the years how to fight for their human and civil rights. Individuals became advocates for themselves, and groups and organizations advocated for their clients to provide them with better services. The U.S. society is now working toward acceptance and to support minorities and immigrants. Of course these minorities must conform to certain standards of the U.S. society to be accepted. In this balancing process of accepting every group, religious and political affiliation from time to time there are different swing though, when different groups (majority or minority) consider that they are gives less attention or right. The term minority also changes sometimes also, just as “poor whites” (Naylor, 1997) are now considered a minority.

While the immigration policy is still marked by political and economic interest through coalitions for ethnic groups’ right and business groups (Wong, 2006), the U.S. society of the 21st century is defined by diversity, conscious of their own ancestors ethnic roots and open to learn about other cultures. When racism and discrimination are still in place, they often are under the disguise of another name or in a different form then they used to be (e.g. language oppression, perceived segregation).

The hard policies passed in recent years to stop immigrants and limit the rights of certain groups of people did not help the U.S. society to create equal rights. Discrimination and racism brought only more tension and negative response from different groups of people. Accepting diversity, integrating it in the society and accepting the changes in the culture of U.S. has been most successful strategy of accepting each groups’ rights.

Social workers are able to play a major role on beside of the minority groups and the oppressed. Their code of ethics requires that social workers fight against discrimination and on behalf of the oppressed and work to help them gain a better life. Their role has been important in the advance for equal opportunities.

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SOCIAL ASSISTANCE - THE PHILANTHROPIC VOCATION OF THE CHURCH

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Abstract:

“The love for the human being” has always been an attribute of God, the great philanthropist. As a practice in the Church it finds its origins in the earthly practice of Jesus Christ. His ministry was a continuous example of care, healings, and the natural outcome of the divine mercy toward our afflicted human nature. After resurrection, He gave His disciple the commandment of love to one another as the foundation of Christian identity. Love can go as far as putting someone’s live for the neighbor. It is the Church that was created out of His sacrificial love the one to continue practice in the world empathy for the disadvantaged, the needy and the abandoned, the elderly and the forgotten. In God’s love there is a place for everybody, this is what the Church has always taught. The present study is both a description of the preoccupation that the Orthodox Church has for the social work and a historical and sociological survey of what has been done and how much more is still to complete. It is therefore important to approach with kindness and responsibility every single member of the community, and provide care through compassion, charity, responsibility in a changing and globalizing world.

Keywords: Orthodox Church, social work, Romania, wellbeing, spiritual disorder, poverty

Suffering and illness-issues in Christian social assistance

Social assistance has been one of the vocations of the Orthodox Church since its foundation, being fulfilled constantly but in secret, in keeping with the ecclesiastical principle stating that discretion should prevail so that “when you give to the needy, do not let your left hand know what your right hand is doing” (Matthew 6: 3). Since the dawn of Christianity, the care for the human person has been reflected in Christ’s concern for all those in need, as He accompanies and assists them not only in their physical and social needs, but also particularly in solving their spiritual problems. This shows Him to have an intimate knowledge

of the human psychology.¹ The Church, as the „the assembly of people that pray and live in communion” (Acts 9: 31; 13: 1; Romans 16: 23 et al.), connects in an indestructible manner the social and physical activity with spiritual life, viewing them as interdependent due to the prevalence that the spiritual has always had over the material aspect from the theological perspective. In striving to find the meaning of his passing through the world, man cannot ignore the ultimate realities, which the Christian religion has approached with much serenity.

From the Church perspective, the ultimate reality is God, unique in being and triune in the Persons, i.e. entities that are in perfect communion. He is the model and the source of communion amongst people. Seemingly idyllic, life according to the Trinitarian community was a reality in the original Christian communities: “Those who accepted his message were baptised, and about three thousand were added to their number that day. They devoted themselves to the apostles’ teaching and to the fellowship, to the breaking of bread and to prayer. Everyone was filled with awe, and many wonders and miraculous signs were done by the apostles. All the believers were together and had everything in common. Selling their possessions and goods, they gave to anyone as he had need. Every day they continued to meet together in the temple courts. They broke bread in their homes and ate together with glad and sincere hearts, praising God and enjoying the favour of all the people. And the Lord added to their number daily those who were being saved.” (Acts 2: 41-47)

One of the first visible effects of such life lived in communion was the healing of psychosomatic disorders and the alleviation of ailments which were otherwise incurable. The healing of disease was a gift of the Church, often disputed and interpreted emotionally, yet for many it was and still remains the only way to be released from the domination of a traumatic state. To understand man’s need to be in good health one must realise that ‘communion’ plays the primary role in the person’s activity, and the presence or lack of communion can help or destroy a person.

¹ „All the philanthropic work of the Church as a divine-human institution and also of each of the faithful is fulfilled by the cooperation with Christ, the greatest philanthropist, Who has always been and shall be within the Church until the end of time. He has made philanthropy the road to perfection.” Cf. Rev. Mihai Vizitiu, *Filantropia divină și filantropia Bisericii după Noul Testament* [Divine Philanthropy and Church Philanthropy According to the New Testament], Iasi: Trinitas, 2002, p. 163.

Communion is a blessing that God bestowed on the first persons, besides the triune Self, and they perceived and experienced it as an ontological necessity. The lack of communion leads to suffering, which is part of the process by which a person seeks to restore their relationship with God.

Suffering is not necessary and should not exist but when it occurs its role is pedagogical: it shows to the person who experiences it in whom he should base his hope and also gives the people around him the opportunity to exercise 'philanthropy'. It is part of God's secret plan for each person. According to the Apostle Paul, it would be impossible to penetrate the mystery of God's work with each individual person without understanding suffering: "Oh, the depth of the riches of the wisdom and knowledge of God! How unsearchable his judgments, and his paths beyond tracing out! Who has known the mind of the Lord? Or who has been his counsellor? (Romans 11: 33-34). The Apostle himself declares that certain suffering enables him to realistically understand God's plan for him: "To keep me from becoming conceited of these surpassingly great revelations, there was given me a thorn in my flesh, a messenger of Satan, to torment me. Three times I pleaded with the Lord to take it away from me. But he said to me, 'My grace is sufficient for you, for my power is made perfect in weakness.' Therefore I will boast all the more gladly about my weaknesses, so that Christ's power may rest on me." (II Corinthians 12: 7-9).

The search for physical wellbeing at all costs and the avoidance of suffering has fostered a sensationalist approach to healing through faith, by promoting practices that the Church itself discourages, on the basis of Scriptural arguments. Christ warns of the danger of seeking miracles and signs, while ignoring the true way of alleviating suffering, i.e. God's love, as reflected in the world in the love for one's fellow human persons, which must not be just a theory. The parable of the Good Samaritan provides the model of social assistance based on neighbourly love and communion between people, in keeping with a certain discipline. In short, a man saves a stranger, compassion being the only motivation for his act (Luke 10: 30-37). The parable's aim is to show that there is hope for each person when there is charity, while without charity not even one's blood brother can be one's 'neighbour'.

In following Christ's model, Christianity has been aware of and has embraced physical suffering and ailment as instruments that give man the meaning of his metaphysical existence which one is unable to grasp

independently from the divine power.² Therefore, the message of the Christian community, which is the message of the apostolic Church, which has always preserved the gospel teaching and practice in the spirit of tradition, has never been and could never be a comforting message, not even to those that follow and observe its precepts. Man is tempted to think that there is an answer and an explanation to every question about suffering. In part, it is normal for man to think so. Yet the answer does not lie in finding the cause of suffering but in relieving it and in finding avenues to understanding the opportunity that suffering holds for the sufferer and for those around him. This is an occasion for mutual help and peacemaking, as pointed out by Mother Teresa of Calcutta: „The fruit of silence is prayer; the fruit of prayer is faith; the fruit of faith is love; the fruit of love is service; the fruit of service is peace”³. There are no ultimate rules and infallible recipes that guarantee physical or psychological healing because each human person is unique and relates to God in a unique and unrepeated manner. From the theological perspective social assistance is motivated by the love for one’s fellow human beings and the respect for the human person created in the image of God and such principles guarantee a universal inclusion, whereas hatred and sin block the road to Christ, hinder communion and lead to solitude.

Wellbeing and health or human solidarity as the answer to poverty and suffering

Christ’s coming marked the beginning of an unmediated relationship between God and mankind, based on love and empathy. He came into the world to bring the simplicity of existence, mutual recognition, spiritual and physical wellbeing and the faith the Redeemer of all and the return of all those saved to a life in communion with their Creator. The healings performed by Christ were the result of forgiveness out of love, which he first offered to the soul of those cured. “Forgiveness breaks the chain of causality, for the one who forgives you takes upon himself the consequences of your actions. Therefore, forgiveness always

² St. Theophan the Recluse considers that both in illness and in alleviation or cure it is important for man to be aware of God’s plan for oneself and above all to not lose patience and serenity when thinking about the ‘trial’ that God has in store for one or about one’s meeting with Him. St. Theophan the Recluse, *Illness and Death*, (București: Sofia, 2002), p. 21-43 *passim*.

³ Lucinda Vardey (ed), *A Simple Path. Introduction to Mother Teresa*, (New York: Ballentine, 1995), p. XXXVIII.

involves a sacrifice”.⁴ Christ’s life was indeed the ultimate sacrifice was He took upon himself the sins of the world and healed human nature from within, bringing it up to *theosis*.

Man generally views wellbeing in his earthly life in terms of primarily material welfare and spiritual wellness. For a theologian, wellbeing is primarily a state of the spirit. It begins with a certain discipline that one must acquire and exercise: first one must rank his wishes, and then set a transcendent ideal to follow steadfastly. Finally, as one aims for this ideal, one must relate to one’s fellow, because spiritual progress is only achieved by relating with other people. In the Eastern Christian experience, starting from the example of the first Christian congregations (Acts 2), wellness cannot be accepted as an individual fulfilment but as communal achievement wherein man disciplines his own desires and selflessness and is aware of sacrifice. Providing help to the neighbour becomes, for the practising Christian, his contribution to the establishment of God’s kingdom on earth as a visible and attainable ideal. Giving presupposes forgiveness, that is, a positive spiritual state. The Church embraced from the earliest times the concern for the wellbeing of those in need, seeking relief for their social plight.⁵ One must note that in achieving this state of wellbeing the Church and the State work as two complementary social entities. This was the actual situation in the Byzantine Empire where the two institutions cooperated in seeking the material and spiritual progress of citizens. Yet as the State gradually abandoned this ideal in favour of politics, the Church took on several prerogatives such as its continuing service of the faithful. The Church cannot repudiate or distance itself from the faithful, as it would then cease to be a Church, yet this does not mean that it becomes a social institution like all others. The church values of philanthropy, love and care for the people have become general values adopted by the state and the society at large, yet the Church preserves the transcendental dimension of the care for the human person.

In lay terms, health has two components: one a practical level, it is the state of physical wellbeing, meaning that a person does not suffer from temporary or constant pain and is not impaired or disabled; on a spiritual level, health is the state of peace, gratitude and fulfilment

⁴ Dag Hammarskjöld, *Makings*, (New York: Alfred A. Knopf, 2001), p. 197.

⁵ Stanley Samuel Harakas, *Living the Faith. The Praxis of Eastern Orthodox Ethics* (Minneapolis: Light and Life Publishing Company, 1992), p. 362.

wherein the intellectual, the mental and the affective activities are in harmony.

When referring to 'health' in one's relationship with God, things become more complicated: "health" in theological terms means "redemption" (the Greek *soteria*), i. e. that state of harmony within the person, between the person and the outside, which is the created nature and God. It is therefore clear that physiological health is not a goal of theology in itself. The Church seeks primarily the spiritual health. For example, a physically impaired person who is spiritually healthy can experience physiological suffering as theological health, depending on how he approaches suffering. This leads to the paradox which states that through suffering man comes closer to God, to the source of health, while through health a (spiritually unhealthy) man can distance himself from God.

We will not explore the criteria of God's work together with man for his holistic health, but will only highlight the fact that he does not bring illness along in order to bring people closer to Him, but allows it, enabling them to interpret its message themselves. There are people who bear illnesses without being burdened, accepting them as pedagogical ways leading to Christ. Christ healed the physiological illness only after making a clear hierarchical distinction, by emphasising that the first step towards recovery is the understanding of the meaning of the physiological disorder, underlying a spiritual deficiency, upon which he would perform the healing itself. He has always been the healer par excellence, showing that divine power is above suffering and that He wants everyone to be healed, through the forgiveness of sins and banishing of weakness.

The opening chapter of the Bible tells that Adam was created a healthy man, enjoying in Eden the created nature and bodily health (implied by his harmony with the Creator). It is stated that work was a pleasant activity that helped him be an active person and maintain his physical powers. The notion of pain emerges after his sin, as work becomes a burden, the childbearing is pain, the ground produces thorns and thistles, and suffering becomes universal through Cain's fratricide, which causes a social imbalance that engulfs the victim, the parents, the Creator and nature (the brother's "blood cries out from the ground", Genesis 4: 10-11). The effects of sin extend in the community, the society, nature and the universe. It is the first unequivocal sign that illness

is closely connected with sin and with abuse. Through sin man lost the connection with God, the source of spiritual health and with the source of physiological health, i.e. the welcoming nature, the home (*oikos*) where God had put Adam. Jesus Christ confirms this fact when he forgives the sins of the paralytic man, thus eliminating the cause of the physical illness. The healing of the body occurs as a natural phenomenon and, to Him, it holds a symbolic and temporary value.

In the face of the generalised crisis of the present day, man has become increasingly aware of and interested in thoroughly exploring the sources of physical and psychological health. Some people discover God, the infallible source, by genuinely returning to a life of faith. They seek to regain harmony in nature by making particular choices in consumption.⁶ In other words the nature that produces the food is increasingly “ailing” (the term should be understood in its primary, not the metaphorical sense). Man’s interventions bring this ailment on the environment, through genetic modifications and pollution. Genetic modification aims to increase productivity and sales, make products more attractive and pleasant and provide ever greater comfort through waste. Nature is sacrificed to satisfy man’s craving through irreparable damage.

One can conclude that man needs to reconsider two terms: cleanness and cleanliness, the former referring to the soul, the latter to the biological self and the environment. By sinning, man does not harm God, but “kicks against the goads” (Acts 9: 5), meaning that he harms himself, as he loses the “garden” of harmony, suffers from disease and is estranged from his neighbour. Paradise in the Apocalypse, as described by St. John the Evangelist, is a garden in the middle of which lies the Tree of Life whose fruit the redeemed (i. e. the “healthy”) will taste, thus restoring harmony with the universe.

Philanthropy-the social theology of the Church

Theological discourse has retained the term “philanthropy” to refer to the attitude of a Christian towards his neighbour in dealing with welfare, poverty and illness. The extent of one’s commitment to one’s neighbour is determined by the fraternity of all in God and not by social standing, ethnicity or religion, which is why the term “social assistance” has not been used in this context throughout the centuries. Social

⁶ It is an increasingly common to spot consumers closely examining the labels on the products they buy in supermarkets, to verify whether they are “bio” or “organic”.

assistance is a more recent formula, one might say a secular one, requiring professionalism in dealing with social issues and target groups rather than the inner motivation of social action.⁷ One could say that the notion is less generous and so philanthropy prevails over it. Philanthropy means care for the person seen as an eternal being of immeasurable value and not simply the concern for man's social needs or for making the social system be more equitable for man as a physical entity. Philanthropy may be practised in all the political and social systems as it is a question of vocation and of person-to-person communication.

Christianity seeks to harmonise man's material and spiritual needs, which it has always viewed as complementary realities. The early Christian Church viewed philanthropy as a duty of the eternal life, rich in moral meanings. The first types of organisations through which the Church worked to protect the disadvantaged were the church communities with communal property, church communities organised as colleges, corporations and associations, as allowed by law, and the communities without communal property which had a network of religious societies and social care establishments. The oldest such religious societies grouped widows, virgins and deaconesses, whose goal was to help people in need. From the earliest times, the social care institutions set up by the Church have helped poor families, orphaned or abandoned children and the sick elderly, providing care, schooling and religious education, aiming for their moral and social integration.

During the first Christian centuries, under the patronage of Roman emperors, from Constantine the Great to Justinian, several types of institutions providing social care were established, including nursing homes for abandoned children up to seven years old, orphanages, shelters for young women raised by poor families or in orphanages, asylums for

⁷ Theologians define secularism as means the irreconcilable separation between the religious and the lay society. According to Alexander Schmemmann, secularism is the medieval reaction of society against the Christian clericalism, its most conspicuous form in the life of man being the lack of public and private prayer. Other theologians have described secularism as the individualistic behaviour of man, as from a belief that death does not exist or God does not exist (*etsi deus non daretur*). For a classical discussion of this issue from a Christian Orthodox perspective, cf. Alexander Schmemmann, *For the Life of the World*, (New York: St. Vladimir's Seminary Press, 1973), p. 98-99 and 117 et seq. and Rev. Gheorghe Popa, *Comuniune și înnoire spirituală în contextul secularizării lumii moderne* [Spiritual Communion and Renewal in the Context of the Secularisation of the Modern World] (Iasi: Trinitas, 2000), p. 21.

elderly and deprived widows and groups of Christian volunteers who provided medical services to the sick. During the Middle Ages, monasteries preserved, further organised and promoted the spiritual model that combines contemplation and practical action for the benefit of the disadvantaged.

Church philanthropy as organised care for the disadvantaged is motivated by the fact that the person was created in the image of God. The theological base of social assistance resides in man's dignity, which is not highlighted by science: it is the work of a rational and personal reality, i. e. a partner in the universal rationality from which it originates. Human dignity also derives from God's personal care, as he was willing to become flesh and restore man to the original communion. Equally important is man's Trinitarian makeup, namely his communal dimension, as a person seeking and capable of relating.⁸

Christian communion is based on love (I John 4: 8). The love for one another has nothing to do with "*eros*", as it encourages empathy and sharing in the suffering of one's neighbour. Love is the second greatest biblical commandment. The neighbour is designated in the Christian scripture as an unknown person who becomes the Samaritan from whom no sympathy could have been expected for the one who "fell into the hands of robbers" (Luke 10: 29 et seq.). The notion of neighbour does not exclude one's relatives or friends, but also includes strangers, one's enemies and those who have left this world: "And if someone wants to sue you and take your tunic, let him have your cloak as well. If someone forces you to go one mile, go with him two miles. Give to the one who asks you, and do not turn away from the one who wants to borrow from you. "You have heard that it was said, 'Love your neighbour and hate your enemy.' But I tell you: Love your enemies and pray for those who persecute you, that you may be sons of your Father in heaven. He causes his sun to rise on the evil and the good, and sends rain on the righteous and the unrighteous." (Matthew 5: 40-45). According to the same text one's obligations towards one's neighbour include the respect for life and forbidding any murder, the protection of the neighbour's health and property against greed, the responsibility for the neighbour's freedom, the responsibility for the neighbour's salvation, empathising with the joys

⁸ Cf. Jürgen Moltmann, *History and the Triune God* (London: SCM Press, 1991), p. 111.

and trials of one's neighbour, regardless of their social standing and also irrespective of the way they actually react to Christian love.

The first step that the loving religious community makes is to determine all its members to join in solidarity with those in need and providing instant aid. There follows a long process of aid and education aimed at overcoming deprivation and providing health care, shelter and food. There will also be religion-themed visits, activities promoting better knowledge of faith, inclusion in social life and raising the awareness of one responsibility.

Church and State in social responsibility

Although owing to its social activities the Church has had great credibility throughout its history, nowadays state non-religious power and influence is greatly increasing while the Church's influence or authority is generally declining. This process has a negative impact on the social activities of the Church.⁹ Under these circumstances, the Church must expand its philanthropic care to those areas that are not properly attended to by the lay State, particularly the people who do not have political influence and are not representative as an "electoral mass" in the politics of a particular community. The care for the neighbour manifested by the civilian authority is not necessarily founded on love for the neighbour, but rather emerges from the cold calculation that in order to preserve its stability and security, society needs to develop social assistance and security measures for the disadvantaged. This is where the main distinction between social assistance and philanthropy lies: the local community, through the social assistance system helps a person in times of suffering or social challenge, providing the necessities within the boundaries of the law, in agreement with the interests of the political majority. Christian philanthropy is not simply confined to giving the poor and the sick what they need for biological existence. Philanthropy is always accompanied by catechisation or teaching and bears Christ's message. Its target is not the body in itself, but the person as a

⁹ Samuel Harakas, *Let Mercy Abound: Social Concern in the Greek Orthodox Church*, Brookline, Holy Cross Orthodox Press, 1983 and *Health and Medicine in the Eastern Orthodox Tradition*, NY, Crossroad, 1990.

psychological and somatic entity¹⁰ that seeks spiritual release or salvation. It would be a mistake to mistake the implementation of social assistance regulations as prescribed by State laws with philanthropy, which is a state of human communication with eternity.

The kind of social assistance that the Church practises aims to promote values and eliminate immoderation in dealing with material things, to teach the economical use of resources, thus creating a space where selfishness, self-centredness and greed should no longer exist. It discourages individualistic orientations, the get-rich-quick attitude and avaricious excesses, while promoting care for the community, responsibility towards the neighbour and compassion for the weak and helpless, in agreement with the biblical commandments: „Then the King will say to those on his right, 'Come, you who are blessed by my Father; take your inheritance, the kingdom prepared for you since the creation of the world. For I was hungry and you gave me something to eat, I was thirsty and you gave me something to drink, I was a stranger and you invited me in, I needed clothes and you clothed me, I was sick and you looked after me, I was in prison and you came to visit me.' "Then the righteous will answer him, 'Lord, when did we see you hungry and feed you, or thirsty and give you something to drink? When did we see you a stranger and invite you in, or needing clothes and clothe you? When did we see you sick or in prison and go to visit you?' "The King will reply, 'I tell you the truth, whatever you did for one of the least of these brothers of mine, you did for me.'" (Matthew 25: 34-40). One can conclude therefore that the philanthropic work carried out within the Church, if deprived of the theological component, would amount to philanthropy done as a job, emptied of the transcendental essence, i. e. the love of God and of people. When resources run out, such a programme will inevitably be cancelled.

¹⁰ For the definition of personalism in theology, see Christos Yannaras, *Abecedar al credinței* [Elements of Faith] (Bucharest: Bizantina, 1996), p. 42-45. Fr. Dumitru Stăniloae calls man an “undying being” and shows how man can become eternal through the union with the hypostasis of Christ made man. Cf. *Chipul nemuritor al lui Dumnezeu* [God's Eternal Image] (Craiova: the Publishing House of the Metropolitanate of Oltenia, 1987), p. 138 et seq.

Romania-the “poor child” of united Europe

During the past 20 years, poverty as a phenomenon has expanded in Romania, against the background of unprecedented increasing social discrepancies, between the very rich and the very poor. However, the state protection and aid system has failed to deal with cases of extreme poverty because the role in the community of the social assistant has not been properly understood. Any analysis of poverty involves nowadays statistical data, an approach that is regrettably absent from scholarly sermons on the need for generous acts. Such figures provide to all interested parties an accurate assessment of distress in a particular area at a particular point in time. The local church works with each person from the spiritual, geographical and temporal world under its jurisdiction, but, at the same time, the universal Church is responsible for the entire mankind, acting in an all-encompassing manner with enduring love for each person.

The table below provides figures on poverty in Romania during the period 1995-2000:

Year	Poverty rate % of population	Extreme poverty rate % of population
1995	25.3	8.0
1996	19.9	5.1
1997	30.1	9.5
1998	33.8	11.7
1999	41.2	16.6
2000	44.0	N/A

In reading such data any Christian must be appalled by the fact that approximately half the country’s population was affected by poverty in the year 2000. The 44% figure means that around 10 million Romanians were affected by poverty-a level that could not be dealt with by the state social assistance system or the still fragile and developing Church philanthropic network.

The figures indicate the actual position of the country in the dramatic ranking of poverty in Central and Eastern Europe. During

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roughly the same period (i. e. 1995-1999), the poverty rate in this area reached the following levels:¹¹

Country	Year	US \$2 PPP*/day % of population	US \$4 PPP/day % of population
Moldova	1999	55.4	84.6
Russia	1998	18.8	50.3
Albania	1996	11.5	58.6
<i>Romania</i>	<i>1998</i>	<i>6.8</i>	<i>44.5</i>
Macedonia	1996	6.7	43.9
Latvia	1998	6.6	34.8
Bulgaria	1995	3.1	18.2
Lithuania	1999	3.1	22.5
Ukraine	1999	3.0	29.4
Slovakia	1997	2.6	8.6
Estonia	1998	2.1	19.3
Hungary	1997	1.3	15.4
Poland	1998	1.2	18.4
Belarus	1999	1.0	1.0
Croatia	1998	0.2	4.0
Czech Republic	1996	0.0	0.8
Slovenia	1997/98	0.0	0.7

In Romania, in the year 1996, daily purchasing power parity per person was the equivalent of US \$2 for 6.8% of the population and US \$4 for 44.5%. In other words, 6.8% of the population lived in extreme poverty, a situation that turned Romania into a vector for poverty, ranking fourth among the poorest CEE countries.

Besides the effects on the dignity of the human person, poverty has devastating effects on the social system. Sociologists and theologians have shown that it strikes primarily the foundations of family, so that for many the idea of Christian family has become a religious theory. Whereas in 1995, approximately 70% of Romanian families with four children were affected by poverty, by 1998 the proportion had risen to more than 80%. Following the waves of emigration after the year 2000

¹¹ The statistics regarding poverty use the US \$/day/adult thresholds for the PPP level in 1996. Source: World Bank, 2000.

and in particular after 2007, with Romania's accession to the EU, the state of the family is truly dramatic: abandonment and divorce rates have risen to unimaginable levels, leading immediately to psychological, educational and social trauma in the children deprived of parental care. Often these children will display antisocial behaviour, such as alcohol and drug abuse.

Poverty has unavoidable repercussions in education. In a poor family, whose head never attended schooling, there will always be an unfavourable (even dismissive) view of the children's wish to go to school. There is actually a measurement of poverty that takes into account the education level of the head of the family. Thus, around 43% of the families whose head had not attended school were poor in the year 2001, yet at the same time 6% of the families whose head was a university graduate were affected by poverty.

Poverty is also calculated in relation to the occupation of the head of the family. Thus, in 2001, poverty touched 60% of Romanian families whose head was unemployed, around 56% of families whose head was a farmer and also almost 30% of families whose head was employment.

In recent years, besides poverty, a large part of the population has experienced extreme weather conditions caused by climate change, from tornadoes to devastating floods. These have led to an alarming increase in the number of people living below the poverty line, as they have lost their possessions and cannot be compensated by the State. On top of this, the worldwide economic crisis, experts predict, will particularly strike the poor and vulnerable groups in the less developed countries in Europe.

Social assistance in the Romanian Orthodox Church

Since 1990, the Romanian Orthodox Church has been able to resume its traditional activities in the social field, which have greatly expanded and diversified, focusing on an ever larger number of people and dealing with a multitude of social issues generated by the socio-economic transformations in Romania. The years after the Romanian revolution have brought to light a reality that neither the theologians nor the sociologists had expected: the strength and vitality of a Christian faith which, although oppressed through decades of communism, did not surrender, but paradoxically was able to emerge stronger in intensity and service. As is widely known, the final years of communism were unfavourable to the Church, which was not allowed to carry out its social

work in society or to establish and maintain places of worship. Not even the sympathisers of the communist regimes were spared, due to obstructions, for example, on buying private houses. As a result, after regaining freedom in 1989, besides the desire to have their own homes, Christians embarked on a building a great many churches. The priority was to offer the community a place for meeting with God, based on the belief that where there is prayer, there is will also be human solidarity.

On 27 May 1997, the Holy Synod of the Romanian Orthodox Church decided to establish the Social assistance network within the Church and to approve the Rules for the management and operation of the social assistance system in the Romanian Orthodox Church, which would provide a coherent framework for the social and charitable activity.¹² In agreement with the objectives of the social assistance network,¹³ Church infrastructure was reorganised to meet the demands of specialisation and enable diverse activities including after-school programmes, care for the elderly or the disadvantaged, courses and youth camps to raise environmental awareness, study the bible or discuss family violence.¹⁴

The Statute for the Organisation and Functioning of the Romanian Orthodox Church, adopted in 2008, refers explicitly to the importance of social care as an integral component of the religious assistance that is the remit of the Church. Article 137 states: “The the social assistance system of the Romanian Orthodox Church is integrated and organised professionally within the administrative departments or in social

¹² Article 2 states: „The social assistance system is integrated and organised professionally within the administrative departments of the Romanian Orthodox Church. The social and philanthropic associations and foundations that operate under the jurisdiction of the administrative departments of the Church are legal entities, in agreement with the legislation on NGOs”. For a detailed analysis of the social work of the Church after 1990, see Rev. Ioan Vicovan, *Dați-le voi să mănânce. Filantropia creștină – istorie și spiritualitate* (Iasi: Trinitas 2001), p. 197 et seq.

¹³ Fulfil the mission of the Church. To provide primary services of social and medical specialisation, community support, establish social-medical care facilities, elaborate and implement social practices, partnerships with the specialised public services, raise public awareness about social issues (Article 3).

¹⁴ In Iasi Archdiocese, whose situation I know directly, there is a series of wide-ranging programmes in these fields, including the establishment of a social care charity called ‘Solidarity and Hope’, a medical centre, a dental clinic, social care and preventive education facilities, shelters and day centres for street children and community projects implemented by parishes which address all the sections of society.

philanthropic organisations governed by the Church. The Romanian Orthodox Church, through its local and central units (the parish, the monastery, the deanery, the vicarage, the diocese, the metropolitanate and the patriarchate) and through the nongovernmental organisations operating with the agreement of the competent Church authorities, provide social services accredited according to the the legislation in force”. One can note that the act ensures access to the existing church facilities and enables the Church to set up nongovernmental social assistance bodies and organisations that must be accredited and operate in agreement with the State and the European Union policies in this field.

The Statute also underlines that the Church has its own system of training specialised staff, through the Faculties of Theology that include Social Theology departments. The document indicates that the work of the Church is aimed at “persons, groups and communities in distress, without making any discrimination” (article 137, paragraph 4). Church-based bodies can organise partnerships with “specialised institutions of the state, local administration and NGOs” (paragraph 5).

For the sake of a comprehensive overview, we would like to point out that the Romanian Patriarchate consists of 14,100 church units including: the patriarchal see, five metropolitanates, ten archdioceses, 14 dioceses, 161 deaneries, 11,007 parishes and 2,313 subsidiary parishes, 386 monasteries (5,896 currently existing and 260 under construction), as well as 12,052 church cemeteries.

Also within the Romanian Patriarchate 14,575 places of worship are open for services, including: 63 cathedrals (24 diocesan cathedral and 23 church cathedrals), 10,580 parish churches, 2,072 subsidiary churches, 433 monastic churches, 208 cemetery churches, 12 charity churches, 48 isolated churches, 298 parish chapels, 171 cemetery chapels, 74 parish chantries, 182 monastic chantries, 403 churches and chapels in state institutions (89-in the Army and Home Department, 37 in prisons, 166 in hospitals, 50 in schools and 61 in social assistance facilities).¹⁵ Church units (Patriarchate, dioceses, deaneries, monasteries and sketes) employ 841 persons in managerial positions and 12,855 priests and deacons.

These figures testify that the Romanian Orthodox Church has a complex and developed system which, at least theoretically, has the financial and human resources required to tackle social problems, from

¹⁵ Information on www.patriarhia.ro.

poverty and disease to the immediate needs of disadvantaged persons or groups. Each church is potentially a social centre, each priest or deacon can be a philanthropist with access to strong and motivated human resources. The 14,574 places of worship can become strategic centres for the coordination of social work and starting points for philanthropic action at national level by the 12,855 priests and deacons.

The Church also has considerable potential for volunteer action through the lay organisations that operate under its spiritual patronage.¹⁶ The energy of volunteers must be matched by financial support from civil central and local authorities. As regards specialised institutions, the Romanian Orthodox Church has built, established or organised a system of social care facilities including 57 establishments for children, 20 for the elderly, 74 social canteens and bakeries, 29 medical centres and pharmacies, 21 centres for diagnosis, treatment and assistance for disadvantaged families, and the number of these facilities is constantly growing.

Church philanthropy is not only expressed by figures and statistics but also through active presence in every corner and region of the country; constant action focused on education and engaging each member of the community in social work. The Church is able to establish, fund and manage social assistance establishments and nongovernmental organisations that comply with state accreditation rules and free market conditions. Such institutions managed and utilised by the Church, continuing those church-based social care establishments of the past centuries, can now make up a system of social assistance of Christian Orthodox essence with the formal features required by European legislation.

The European Union, whose regulations already apply to new member states, has decided that social assistance constitutes an independent concept implemented through the activity of state and community institutions in the name of social justice and solidarity, such institutions being staffed by civil servants such as social workers and social assistants. The risk of this approach is the emergence of a group of

¹⁶ Notable organisations at national level include the Association of Christian Orthodox Students of Romania (ASCOR), the League of Romanian Christian Orthodox Youth (LTCOR), the National Society of Romanian Orthodox Women (SNFOR), the Medical-Christian Association "Cristiana" and "PRO-VITA" Association for those born and unborn, as well as numerous NGOs activating in dioceses, deaneries and parishes.

overpaid professionals, who have the knowledge and skills to apply social assistance theory and state laws or to prepare financing applications, but lack spiritual motivation. The effectiveness of such people concerned with the form of the social act comes at the cost of love for the neighbour, through the transformation of persons into statistical numbers. The goal of social action is no longer the salvation of the soul, but reporting a higher number of food portions, supplies and money delivered to the poor and the sick. The church-based system can complete and enrich social service through its spiritual, affective and empathic contribution.

From the perspective of the Church, philanthropy (which includes social assistance) is best applied in the parish, the community of the helpers and the helped, where everyone has the opportunity to be the channel of God's giving love. Through ordination and assignment to a parish, the priest and his family are a model of philanthropy. The new context of freedom has enabled church organisations to help the poor, no longer leaving this service to private charities or public persons who use it to improve their own image. Philanthropy is in a way the heart of the parish, expressed in liturgical worship and service among people, and is not the remit of some charity which provides only occasional and insufficient aid, limited to food banks twice a year or during the election season. Of equal importance are those public social institutions, such as army bases, prisons, hospitals and university campuses served by chaplains. Chaplains are not assigned to a parish but can organise their given community as a parish, as a community of the faithful who are united by the same principles of spiritual life. According to a well-known Romanian theologian, "the Church's social mission in schools, in the army, in hospitals and prisons requires self-sacrifice, love, compassion and fortitude. The mission of the priest is not an invention of the Church or of society, it is a divine commandment"¹⁷.

The Church strives to meet the new social realities, to extend its social assistance network based on the philanthropic work of national NGOs and strong philanthropic centres. It is true that there may never always be sufficient resources to deal with all the challenges of poverty and to provide education through and for the faith and human solidarity in keeping with the universal values of Christianity. The solution or rather the foundation remains the parish, where the priest is called upon

¹⁷ Antonie Plămădeală, *Preotul în Biserică, în lume, acasă* [The Priest in the Church, in the world and at home], Sibiu: 1996, p. 205.

to serve as a philanthropist and manifest the love for the neighbour, to be the first servant of the poor and caretaker of the sick and to offer guidance as well as bread and medicine, just as the Saviour Jesus Christ did. It was He, the Son of God, who promised: "Not everyone who says to me, 'Lord, Lord,' will enter the kingdom of heaven, but only he who does the will of my Father who is in heaven" (Matthew 7: 21 and 5: 19).

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