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# **ČLANKI / ARTICLES**



Gisela Hauss

## SELECTIVE WELFARE: PARADIGMATIC TWISTS IN SOCIAL WORK PRACTICE

*ABSTRACT: The social investment paradigm has been gaining importance within the social policy of post-industrial countries. Investments are made in human capital and aim at shaping productive citizens capable of satisfying the demands of flexible labour markets. The article refers to a research project that aims to explore contemporary changes within everyday practice. The article adopts an ethnographic perspective to analyse the current transformations of everyday practice in the field of unemployment insurance and welfare in the context of activation policies and the investment paradigm.*

*KEY WORDS: social investments, welfare, labour integration, transformation, unemployment*

### Selektivna blaginja: paradigmatični obrati v praksi socialnega dela

*IZVLEČEK: Paradigma socialnega investiranja pridobiva pomen v socialnih politikah postindustrijskih dežel. Investirajo v človeški kapital in imajo namen oblikovati produktivnega državljana, sposobnega zadovoljiti zahteve prožnega trga dela. V članku predstavimo rezultate raziskave, ki se je usmerila na učinke teh sprememb v sodobnih vsakodnevni praksah. Z etnografske perspektive smo analizirali sedanje transformacije vsakodnevni praks v kontekstu aktivacijskih politik in investicijske paradigme.*

*KLJUČNE BESEDE: socialno investiranje, blaginja, delovna integracija, transformacija, nezaposlenost.*

### 1. Introduction

When there is nothing “left to optimise,” welfare recipients are said to end up at the “bottom of the pile.” Counselling time is also said to be minimised in such cases. These statements, from the field of Swiss social welfare, fundamentally question the welfare state’s claim to safeguard social justice. Social transfers are no longer aimed at offsetting disadvantages with direct transfer payments. Instead, the focus lies on purposeful investments in human capital where the fewest possible resources are expected to deliver economically measurable success. This article examines the paradigmatic twists in European social and labour market policies on the level of local practice.

How do the modernisation of European welfare states and the increasing influence of economic principles manifest themselves at social services departments and their front desks, and in counselling? We studied concrete work situations in local authority settings, in which social workers translate current social changes into everyday action strategies and observable human interactions. The local context investigated was the social services department of a medium-sized Swiss town. The professionals observed were chiefly social workers.<sup>1</sup> Welfare policy was studied “on the ground” as everyday social work practice.

Swiss social policy is a part of “changing Europe.” Just as in other Western industrial countries, Switzerland’s social and labour market policies are oriented toward the paradigms of activation and social investment. Swiss unemployment insurance was overhauled in the mid-1990s in line with the activation paradigm. Social welfare and disability insurance were reviewed in 2005 and 2008 respectively.<sup>2</sup> Following legislative reform, persons with an “unfortunate” relationship to labour suddenly find themselves on the edge of society (Castel 2011), where the ice is thin and where they risk social decline or even disconnection. Reform also meant that the free spaces to which the gainfully employed can retreat, albeit only temporarily, from selling their labour have become even more constricted. Persons entitled to state benefits must now provide a return on investment.

Swiss social security and unemployment insurance rely on activation measures. The orientation toward the social investment paradigm means that the financial resources invested in the social sector must yield a “profit.” Investments in social policy are made where resources promise the greatest possible effect, whether in the present or—and here lies the current emphasis—in an anticipated future. Remediating current problems and distress is considered far less effective (Jenson 2009: 450). In this regard, early childhood intervention, which has elsewhere become a desirable objective, is not paramount in Switzerland. The country’s conservative and liberal traditions complicate government measures aimed at families, the labour market, and occupational training. Conservative models of the family repudiate early intervention programmes, which, in turn, influence family education. According to Giuliano Bonoli (2010), in this respect Switzerland is moving toward a light version of the social investment paradigm. Its focus lies on intensifying and specifying labour-integration efforts.

This article explores everyday social work practice at a social services department (see Hauss 2014a). As such, it examines how society deals with poverty (Paugam 2008)

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1. As a rule, Swiss social services, particularly in larger catchment areas, are staffed with qualified social workers. One exception is a small number of non-professionalised social service centres where cases are managed by administrative staff, who delegate specific social-work-related issues to external professionals.
  2. Unemployment insurance, disability insurance, and means-tested social welfare are the three pillars of the Swiss social security system for the working age population. Whereas unemployment and disability insurance are subject to federal jurisdiction and legislation, social welfare is characterised by a lack of standardisation, with each of the country’s 26 cantons having its own legislation.



and unemployment “in the frontline,” “over the counter,” “eye to eye.” Political strategies also provide evidence for the transformation of social security toward activating, that is, investment-based strategies (Magnin 2005; Nadai 2009; Wyss 2005). Scant attention, however, has thus far been given to how this policy translates into concrete practice and everyday interaction. With frontline workers being important actors amidst the ongoing social transformations, what follows closely analyses “street-level bureaucracies” (Lipsky 1980). In “everyday worlds,” as sociologist Dorothy Smith observes (2005: 32), people engage in everyday interaction. On this level, social policy developments become observable in “issues, concerns, or problems that are real for people and that are situated in their relationship to an institutional order” (Ibid.). Here, in the microsociology of social institutions, the “ruling relations,” which far transcend the investigated field, can be studied (Ibid.). Social transformations manifest themselves in the concrete strategies adopted by social workers in local working contexts. How are clients categorised? Which measures are selected? Which orientations become evident, and how do they shape everyday action (Nadai 2014)? This article carries out a microanalysis of welfare state practice in the field investigated, namely, everyday social work practice. To begin with, I outline the current debate in social work theory and research.

## 2. Frontline work under changing rules of the game

The professional debate on Swiss social work within a changing welfare state takes up the European discourse (see Staub Bernasconi 1995; Sommerfeld 2013). Activation and the social investment paradigm have initiated a broad debate in both social work theory and practice. Changes in the labour market and social policy, and the position(ing) of social work, are now the subject of intense and critical discussion (Böhnisch and Schröer 2001; Lorenz 2006: 137–177; Anhorn, Bettinger and Stehr 2008; Dahme and Wohlfahrt 2008; Leskošek 2009: 1–6; Ferguson 2009; Leskošek 2010). The restructuring of the welfare state and the intensifying of the social investment paradigm have changed the starting point for social work in Western industrialised countries. This is particularly true, as Walter Lorenz has remarked, because in no country has social work managed to overcome its dependency on the respective welfare regime (Lorenz 2006: 165). Lorenz gets to the heart of the changes accompanying the restructuring of the modern welfare state: “Social work is becoming an instrument of commodification, of increasing the market value of human labour and personal transactions, even care itself. Social relations are to be transformed into commodity transactions on which a globalised digital capitalism depends, and the absorption of social services themselves into a limitless commodity market is but one sign” (Lorenz 2006: 138).

Regarding the criticism levelled at the changing welfare state and the related economisation of social work, the expansion of the welfare state after the Second World War is usually considered a positive counterpoint. At the time, a type of social work emerged that functioned beyond socio-political and material security systems. During Fordism, gainful employment was neglected in social work theories and concepts.

Theorists and practitioners instead concentrated on holistic education and training. Various concepts adopted from the United States, such as casework, group work, and community work, came to determine tertiary social work training programmes and their curricula (Maier 2009: 17). Social work at the time has been described as “a social infrastructure for coping with life” (Hering and Münchmeier 2000: 231). It functioned largely beyond socio-political and material security systems (Rauschenbach 1999: 28). Society provided labour, and thus income security. Until the late 1960s, employment security, continuity within employment relations, and increasing per-capita income within advanced Western industrial societies meant that social work could position itself as a form of compensation in relation to production. Capitalist societies called for the demands of work to be offset. Accordingly, the welfare states sought to create free spaces, that is, “protectorates,” in which the commodification of social relations could be kept in check (Esping-Andersen 1990). Compared to other European countries, the Swiss welfare state was expanded rather late and private sector actors performed important welfare state tasks. What emerged as a result were mixed-welfare economies and manifoldly ramified delegation structures between government, public law, and private facilities on the federal, cantonal, and municipal levels. Within these structures, social work considerably expanded its provision in the areas of reproduction and education.

Going further back in history soon reveals that whereas social work participated in postwar prosperity during Fordism, it has previously been closely entwined with material security systems. Poverty remained a real threat for wide sections of the Swiss population well into the twentieth century. Large portions of the working class, but also of the rural underclass, were affected by insecure working and precarious income conditions. Welfare tied public assistance to harsh conditions and severely curtailed the rights of welfare recipients. Adults were obliged to earn their own living and to contribute to the upkeep of the residential institutions housing them. This policy was soon expanded to youths, and in many cases also to children (Hauss 1994; Hochueli Freund 1999; Hauss and Ziegler 2010; Hauss et al. 2012; Lippuner 2005; Leuenberger and Seglias 2008). Welfare workers coupled the struggle against poverty with the obligation to work. They had a wide range of measures at their disposal, including sectioning and the removal of children. Historical studies suggest that public welfare did not always manage to balance support and disciplining for the benefit of its clients. Human labour was exploited and coercive welfare measures were enforced that must be condemned from a present-day perspective.<sup>3</sup>

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3. Several European countries have recently undertaken efforts to reappraise the social isolation, compulsory work or even sexual or physical abuse which was in many cases associated with placing children in foster families or residential child care. On 11 April 2013, a memorial service was held in the Swiss capital Bern. The confederation, the churches, and various associations acknowledged the difficult circumstances in which the victims were raised and issued a public apology for the wrongs committed. That was the starting point for the “Round Table” meeting the first time in June 2013 in order to discuss reparations for those concerned.

Let us return to professional practice amidst the current transformations of social policy. In this field, social work is once again challenged to take position, in the dilemma between the orientation toward economic principles and its genuine mandate to foster its clients and to support their efforts to cope with everyday life. Reflective historiography (Maurer 2009) enables social work to raise critical questions about its role as a profession amidst changing social policy and the ensuing new “rules of the game.” The following discussion starts from the local practices observed at a social services department (Hauss 2014 a, b). How do social workers deal with the existing force fields in their everyday practice? Which strategies do they develop? How far does the microcosm of the department reported here reflect the role played by social work amidst new social policy rules?

### 3. Research Field and Methodological Perspective

Observing a Swiss social service centre might lead one to expect insights into how an affluent society deals with poverty. Despite low unemployment, and although poverty remains largely invisible in Switzerland, it nevertheless exists and shapes lifeworlds and biographies, perhaps even more embarrassingly and individualisingly than in countries where the shortage of labour has obvious structural reasons. Not everyone can enjoy Switzerland’s high living standards. Approximately every seventh person in the country lives under precarious conditions, including men, women, and very many children. Up-to-date statistical data reveal that out of a total population of 7.5 million, 1.07 million people (14.2 %) are threatened with poverty while 7.9 % (approximately 600,000 people) are affected by severe material deprivation. Compared to other European countries, unemployment is low. According to the definition of the International Labour Organisation (ILO), 4.1% of the Swiss working population were unemployed in the fourth quarter of 2013.

Currently, Swiss unemployment insurance and social security as a field of practice is a vast and barely comprehensible market of labour-integration, occupational, and educational measures, true to the country’s typically federalist structure and the manifold responsibilities of the confederation, cantons, and municipalities. What are widely differentiated measures coincide with the intense selection practices of the local authorities responsible for allocating individuals to programmes. The regional employment centres, operated under the jurisdiction of the federal unemployment insurance, and social services, operated under the jurisdiction of federal social security, categorise their clients and allocate a large number of welfare recipients to diverse labour-integration programmes. The same applies to the country’s social services, which decide which welfare recipients must participate in which programme, who is assigned to which educational measure, and who is sanctioned for failing to cooperate with labour-integration efforts.

The empirical basis of this article is an extensive research project, “Profitable Investments: Promoting Gender Equality through Social Investment and Activation

Measures?”<sup>4</sup>. The selected research results discussed here refer to the social services department of a medium-size Swiss town and focus on the function of social work within that department.

“Profitable Investments” was a multisited ethnographic investigation. It examined its subject in various fields, each of which provided partial responses to the overarching research question (Maeder 2005). The ethnographic field was considered not so much a concrete physical location than a network of sites, actors, ideas, and events investigated over the course of the research (Cook et al. 2009). As mentioned, the project focused on unemployment insurance and social welfare. Within these fields, two kinds of strategic sites were selected for analysis: first, the state welfare agencies and unemployment offices deciding the measures to be taken and allocating clients to such measures; second, agencies implementing measures in practice. The study involved in-situ participant observation and guided interviews with clients and staff (see further Nadai, Hauss and Canonica 2012). Data collection and analysis were based on Grounded Theory (Strauss and Corbin 1990). This article focuses on social work in general and, as said, on observations and interviews at a social services department in particular (Hauss and Canonica 2012; Hauss 2014a).

## 4. Everyday Social Service

The social workers at the social services department under study are subject to the impact-oriented Cantonal Social Welfare Act passed into law in 2002. The appointment and employment conditions of the social workers both reflect high professional standards. The social services department cooperates closely with a centre for professional integration, which offers various programmes aimed at employability assessment and labour-market integration.

### 4.1 Selection

Only selected client groups are eligible for intensive counselling. Social workers are instructed to commit their time increasingly to cases promising the greatest possible return. Enforcing this policy presupposes client selection. Investments are thus future-oriented. One crucial question in this respect concerns the attainable return on investment. However, this “economisation of public administrations and social services providers’ (Dahme and Wohlfahrt 2008: 53) is reaching its limits in the social services sector. Here, in the “final safety net” of the social security system, considering returns

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4. This article is based on “Profitable Investments: Promoting Gender Equality through Social Investment and Activation Measures?” (Nadai and Hauss), a research project conducted within the Swiss National Science Foundation Programme No. 60 on Gender Equality (NFP60) and investigating social investment practices in the area of unemployment. (see Nadai, Hauss and Canonica 2012). The research was conducted as an ethnographic study undertaken in six institutions concerned with the labour-market integration of unemployed persons: a regional employment centre and a city social services department deciding on client-to-measures allocation and four integration programmes carrying out the ordered measures.

on investment has only limited value. At the social services department studied, intervention aimed exclusively at professional integration was deemed unrealistic, not least due to the large number of “social security pensioners”—a point that could hardly be made public, however. Social integration and building everyday skills, two objectives pursued by the social workers together with their clients, proved almost impossible to calculate in terms of a return on investment. Public pressure, moreover, made it difficult to preserve some leeway for social services to support people in a sector that resists economisation.

The new steering models, whose orientation derives from investment logic, are changing the traditional, bureaucratically structured counselling practices followed at the social services department investigated. Clients no longer receive the same amount of attention. Clear, objectifiable criteria are now adopted to categorise clients according to the calculable effects, also in economic terms, of counselling resources. One such criterion is age. Using increasing resources for young adults aims to avert the danger of long-term welfare dependency. Various measures, including special counselling settings, a specialised young-adult advisory team, and allocation to specific programmes, reveal that resources tend to be focused on young adults. Older people, however, have only a few years left on the labour market and are considered to have less opportunities of finding employment. A second social service criterion used to justify programme allocation are educational and childcare responsibilities. Families with children are invested in heavily, in order to break the transgenerational, life-long cycle of poverty and thus to achieve a socially and economically highly esteemed impact.

Besides these relatively unambiguous criteria, new social services steering models require clients to be assigned to different groups according to their resources and cooperativeness. However, resources and cooperativeness resist easy operationalisation and need to be translated into practical action guidelines for everyday social-service interactions. On the level of everyday action, social workers classify clients into different groups. Depending on classification, clients are provided either much or little counselling. At the social services department investigated, two questions guided client selection. First, the situation-specific need for clarification and orientation. Experience shows that it is feasible to invest time in unclarified, complex situations where much remains unresolved. Such cases contrast with ones where, as one social worker put it, “a lot is already on track,” and where clients “have their paperwork under control and circumstances are stable.” Two to four meetings a year are enough in such cases. This client group includes the working poor, for instance, who are looking for work of their accord and who merely require financial straits to be offset. Second, the specific case perspective: oriented toward the future, this classification criterion involves greater risks. The key question in this regard is whether or not changes are foreseeable. Social workers justify intensive counselling in such cases on the grounds of “scope for optimisation” or that clients are working on changing their situation. It remains open what change is aimed at precisely. Objectives are negotiated individually and may occur in small steps. This contrasts with the evident lack of prospects for unmotivated clients, who are kept on file merely as “administrative cases” and are offered no counselling.

As one social worker remarked, “no professional social work is done in such cases.” Another staff member, echoing a concept evidently familiar from her training, observed that such cases amounted to “administering exclusion.” Those concerned, who actually need advice, experience being shifted to the subsistence sector as degrading. One client likened this experience to being relegated to the “bottom of the pile.” Whenever possible, social workers defer or avoid assigning their clients to this category. Plainly evident in such cases are the role conflicts between organisational rules and professional self-concepts described by Maeder und Nadai (2004: 109). Summing up this point, one staff member commented, “I want to be able to invite those clients for a talk who simply need contact, but who offer nothing else in return.” No longer being able to invest time in cases promising no tangible impact fundamentally challenges the social workers’ concept of help.

#### **4.2 Getting back on track**

Clients visit the social services department studied in emergency situations. Their lives have derailed and thus—as the field puts it—consultations are about helping clients to “get back on track.” Clients are first explained their position as welfare recipients, including their rights and duties. Clients must provide full disclosure of their personal circumstances. They are threatened with prosecution for failing to reveal all sources of income. We observed that social workers intrude into the personal sphere of clients while stigmatising them as potential benefit fraudsters. The social workers studied are aware of the humiliation and status degradation such intrusion involves for their clients and in response attempt to cushion this asymmetry as expertly as possible. Getting clients back on track begins with an agreement on objectives, which hinges on many factors. Even if social and professional integration are the final objectives, small steps may first need to be envisaged. Getting clients back on track also means registering and cross-linking them with other services. Work capability assessment takes priority. Getting clients back on track is reflected not least by fully documenting their situation, that is, compiling a corresponding file. This involves requesting missing documents, completing forms, and pooling information. Consultations often begin with the same standard question, “What have you got with you?” In return, clients present their documents, which serve to complete and update their file. Counselling intensity is reduced only when clients are considered to be well on track.

#### **4.3 Getting clients moving**

The ethos prevalent among the social workers studied is to *achieve the best possible outcome* for their clients, provided the latter actively contribute to the efforts made on their behalf. One social worker explained the limits of the presumed cooperativeness: “I can go to all possible lengths, but if someone is going to drag their feet and not move, then that’s that.” The social workers have a wide range of measures at their disposal, from motivational discussion skills to threatening sanctions, to get their clients moving or to keep them on their toes. To establish a motivating working alliance within the bureaucratic context, restrictive rules and regulations are explained in terms of institutional

requirements and thus are located outside the counselling setting. Social workers tell their clients, “Look, I’m afraid guidelines are guidelines, and I can’t change them.”

The professionals seek to gain their clients’ trust through “relationship building.” This approach is emphasised in particular in working with young adults. The social workers offer support to clients seeking greater self-determination in daily life. For instance, the professionals welcome clients making their own health insurance payments. Besides motivating clients through building a working alliance and promoting self-determination, the social workers also enforce sanctions. Assessing which role is appropriate under which circumstances not always proves straightforward because pressure does not always have the desired impact. Discussions amongst social workers often referred to the difficulty of achieving client objectives: “Bans don’t make sense because they’ll do it anyway; so you force them into a programme, and then neither measure works.” Pressuring young adults is considered especially counterproductive. One social worker observed, “If you confront them, they’ll block you.” And yet the social workers nevertheless resort to sanctions. Clients are admonished and reprimanded, or threatened with benefit suspensions. In some cases, cuts are imposed; in others, the social welfare inspectors or unpaid work trials are deployed as outsourced supervisory or sanctioning instruments. The requirement to get clients moving bears potential frustration and conflict. Considerable irritation may arise from breaches of trust, such as client statements proving to be false. Counselling thus has an emotional side and the working alliance within bureaucratic structures not only leaves both professionals and clients vulnerable to personal injury but often also involves great emotional strain.

#### **4.4 Funding and overseeing the support system**

Social work is not always so eventful. On some days, it seemed very relaxed and almost boring. One social worker told us, “A social services department resemble a large accounting firm. We prioritise funding over countless other matters, to ensure other institutions can do their work.” Public welfare always involves administration and oversight. For the social workers, supervisory and regulatory duties take up too much space and threaten to oust actual social work. Counselling, assessment, and guidance are partly outsourced. One example is the delegation of employability assessment and job placements to a centre for occupational integration. The department employs “labour-integration specialists” with expert knowledge of the labour market, of application techniques, and of corporate human resources management (Nadai and Canonica 2012, 29). The social workers at the social services department investigated consider themselves “process monitors.” Depending on the case, they check whether a client has made the required number of job applications. They work on the *meta-level*, as one social worker observed. One staff member explained that “things were pretty cushy, in inverted commas” when clients were signed up at the occupational integration centre. She knew that the case was outsourced and that the other office was overseeing her client. Evidently, this applied merely to labour-integration cases. The files of unplaceable clients are soon returned to social services where they remain on the table, just as housing and accommodation do. In the context of unemployment, homelessness, and changing or looking

for accommodation, can lead to existential emergences. No “specialists” are available for such cases. Responsibility remains—and stops—with the social workers.

#### **4.5 Pushing clients out of welfare dependency**

Welfare is aimed primarily at what the field terms “detachment.” Detachment, when it does occur, is hailed as a major achievement. One successful social worker put her hand on the impressively thick case file lying on the table and asserted, “We detached her.” She added that the client had taken a moment to be pleased, to realise that detachment was “cool.” Social service staff should clink glasses, the client said. Celebrated as an achievement, detachment fits the logic of social service administration. Whether the solution is subjectively a positive step for the client, or whether the quality of professional integration is thereby ensured, does not seem a primary consideration.

The swiftest possible termination of financial dependency has utmost priority. Social service workers know that chances of achieving this objective are greater if clients can be discharged into independence within the first six months of signing on. The longer detachment takes, the more clients settle into dependency and take the attitude, “So be it.” Given the heavy caseload per social worker, social services develop their own particular, stress-inducing dynamics. One social worker illustrated these dynamics as follows: cases were fed into counselling at one end, but it was impossible to funnel out as many as were funnelled in. Stress arises from the requirement, she continued, to “detach, detach, detach.” Failing to close no more than a few files each month prompted adverse comments from the management from time to time.

Such pressure contrasted with the formulated objective to ensure sustainable client detachment. Thus, a family with children would not be exposed to a precarious situation. The responsible social worker would establish whether the family’s existence were secure after benefit payments ceased. Correspondingly, social work criticises what the field calls “knee-jerk detachment.”

Pushing for the swiftest *and* most sustainable detachment at one and the same time leads to the blending of operational- and social-work issues, and thus also to the entanglement of pedagogic, economic, and social policy concerns. Amidst this entanglement, the means and the ends are often no longer clearly distinguishable. In many cases, the obligations to reduce the social work caseload and thus social service costs, to consider client autonomy, and to meet the demand for long-term professional and personal integration are barely reconcilable. The drive toward detachment plainly reveals the tensions between the demands of professional casework, administrative logic, and operational principles.

### **5. Conclusion**

When there is nothing left to optimise, welfare recipients are said to end up at the “bottom of the pile.” This statement characterises a new rationale underpinning everyday social service practice in what has become a contested field. With the underlying orientation toward “human capital” welfare is challenged by employment and economic



policies and in risk to be detached from the debate on social rights and social justice. Entrepreneurial thinking now comes up against the everyday work of local authorities, implicit professional values, emotional states, and specific team constellations functioning according to specific self-dynamics. The link between local practices and social policy discourses proves to be ambivalent and contradictory.

The evidence gathered suggests that, “on the ground,” current social policy fosters selective social work. The focus on perspectives and potential effects aligns measures with cases. Alignment is aimed at perfectly matching benefit recipients and measures, so that only little or only short-term support is needed to achieve autonomous subsistence. This applies in particular to highly resourceful individuals. “Good cases” are swiftly discharged from welfare and its programmes, thereby producing a creaming effect. “At the bottom of the pile” remain individuals with poor forecasts. In such cases, social work action as a rule needs to make do with minimal resources and creates a strong need for legitimisation.

Yet are matters really as unequivocal as that? And have the two prevailing principles—activation and social investment—impacted on social work practice as straightforwardly as widely assumed? Our study does not encourage such a conclusion. On the level of everyday practice, the observed economic orientation is often controversially bound up with local circumstances and social work professionalism. “Frontline” social workers employ specific skills to establish rapport, motivation, positive thinking, and concrete behaviour changes among their clients. Clients are regarded as human beings of a certain age and gender, with biographical “baggage” and stumbling blocks to overcome, and who often reject unequivocal categorising processes. Translating the paradigmatic twists into concrete actions leads to the entanglement of different rationalities. Our study observed an orientation toward professional standards aimed at enhancing client autonomy as well as educational and life opportunities. In everyday social service practice, the concept of small steps, guiding clients through transitions, and allowing them to make up for previously missed developments clashes with an economic, selective orientation allocating resources in terms of their anticipated effects and expected returns. Controversial lines of argument and tension-filled interstices emerge amidst the orientation toward “detachment” from welfare as a foremost priority, amidst the endeavours to devise sustainable alternatives, amidst the hesitation about placing welfare recipients on the lowest rung, and amidst the many detours and intermediate steps involved in everyday social work.

Whether these contradictions can be maintained or whether social work methods will eventually bow to an economic logic seems undecided as yet. Whereas the “absorption of social services themselves into a limitless commodity market” (Lorenz 2006: 138) is an undeniable tendency, this proves to be empirically more controversial than hitherto theoretically assumed.

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Monika Götzö

## **FAMILIALIZATION IN WELFARE STATE ARRANGEMENTS: FOSTER FAMILIES IN THE LIFE COURSE OF FOSTER CHILDREN**

*ABSTRACT: Currently enforced discourses on the significance of familial resources as a precondition for education, employability and social mobility reveal aspects of the interplay between state and families in terms of social integration. Foster families are of special interest when studying the drifts in discourses toward a familialization of life course regimes. The research on foster family care highlights the ambiguous negotiations on responsibilities, competencies, expertise and professionalisation, as well as the call to not colonise the intimate familial context. The authors analyse the interplay of the involved persons in the everyday practices, such as local authorities, legal guardians, therapists, parents of origin, foster parents and foster children. In the article, the beginning and the end of the child protection measure is discussed to see how trajectories and transitions are shaped by those involved, and how their acting can be interpreted in terms of life course regimes.*

*KEY WORDS: familialization, life course regimes, foster family care, child protection*

### **Familializacija v ureditvi socialne države: rejništvo in življenjski poteki otrok v rejništvu**

*ZVLEČEK: Sedanji prevladujoči diskurzi o pomembnosti družine kot predpogoja za doseganje izobrazbe ter za zaposljivost in družbeno mobilnost razkrivajo medsebojno prepletenost države in družine, ko gre za družbeno integracijo. Za študij drsenja diskurzov proti familializaciji režimov življenjskih potekov so rejniške družine posebnega pomena. Raziskava pokaže na pomen notranjih pogajanj o odgovornostih, kompetencah, ekspertizi, profesionalizaciji teh družin kot tudi na nujno preprečiti kolonizacijo intimnega družinskega konteksta. Avtorica analizira medsebojno prepletenost oseb, ki so vključene v življenje rejniških družin, kot so skrbniki, terapevti, biološki starši, rejniki, otroci v rejništvu in lokalne oblasti. V članku se osredotoča na začetek in konec ukrepov za zaščito otrok ter na načine vplivanja na njihov življenjski potek.*

*KLJUČNE BESEDE: familializacija, režimi življenjskih potekov, rejniške družine, zaščita*

## 1. Introduction

Families assume particular importance in the development of welfare state arrangements. They constitute a setting conducive to (re)producing the human capital and resources needed by society (Oelkers 2012: 157). Although government agencies are not experienced directly in family life, social policy measures stabilize certain types of families and family behavior (Kaufmann 1997: 103). Government policies and family forms interfere with each other in a complex way.

Current social policy discourses emphasize the significance of self-responsibility, productivity, and employability (Kessl 2013; Lessenich 2003). Discussion focuses on the production of welfare beyond the state and on family contexts as sites for ensuring exactly these skills, self-responsibility, productivity, and employability. The current balancing out of the division of responsibility between the state and the family for the production of welfare can therefore be referred to as familialization or also as “re-familialization” (Oelkers 2012: 155). Specifically, this concerns the responsibility of parents with regard to the social integration of their children. This view follows the argument that the transfer of cultural, social, and cognitive capital to the next generation depends largely on family resources (Kränzl-Nagl et al. 2003; Olk 2009). Parents who behave in a socially responsible manner within this arrangement are rewarded with less direct state control (Oelkers 2012: 155; Oelkers and Richter 2009: 35; Oelkers 2007).

But what does this specific entanglement between social policies and families mean for children who are unable to grow up in their birth families and whose welfare is subject to child and youth protection measures? The example of foster families, as a specific form of child and youth welfare, opens up a multisited field of research for describing the upheavals, shifts, changes, or re-actualization tendencies in current social policy. It is precisely here, thus the common expectation, that the responsibilities between families, specifically between foster parents, birth parents, and government authorities, are negotiated. The fact that foster care not only constitutes current re-familialization but largely upholds previous practice does not necessarily make it a “residual category” of child and youth protection. Maintaining this modality suggests that the existing model does not contradict current discourses. In Switzerland, to which the research presented here refers, the major legislative overhaul between 2005 and 2013 barely altered the fundamental ideology of leaving foster families “in peace” after placement. In January 2014, the formerly lay guardianship authority was replaced by a professional, interdisciplinary, and firmly established authority (Child and Parent Protection Agency, CPPA).<sup>1</sup> The fact that foster placements declined by 30% in the first four months of 2014 points to the difficult negotiations between government authorities and families.

Internationally, child welfare policy is currently shifting from prevention to early intervention (see, for instance, Satka and Harrikari 2008). Essentially, this discursive shift

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1. The German term is the Kindes- und Erwachsenenschutzbehörde (KESB)

involves a focus less on risk prevention than on individuals acquiring coping skills as early as possible. Accordingly, government measures would be expected to concentrate on early intervention, and on long-term investment in education, occupational training, and employability. However, our research on the potentials of the support provided by the foster care system<sup>2</sup> shows how this field of child and youth welfare relies implicitly on the resources of foster families. This leads to unclear responsibilities, which require foster parents—and foster children—to make a considerable emotional commitment. Not only is this situation tolerated by local authority representatives, but their specific form of cooperation with birth and foster parents favors an arrangement that rests explicitly on the emotional ties between foster children and their foster parents so as to ensure the greatest possible support. For foster families and foster children, this implicit support system, which rests on emotionality and affiliation, presents challenges that place an extreme strain on what is already a fragile relationship. In particular the fact that the very agency representatives who rely on foster parents assuming emotional responsibility also expect such parents to maintain contact with a child's birth parents, and even to actively shape such relationships, clearly reveals the contradictions within this arrangement, whose consequences are far-reaching for those directly affected.

This article explores how the entanglement between family types and the agency-initiated support provided by child and youth welfare affects the relationship structure on the one hand, and the life course of former foster children on the other. It shows that foster families are not just “particular families” (Wolf 2013), but in effect a complex figuration of many stakeholders, including diverse agency representatives and exponents of an extensive expert system.

First, I introduce the background to the research reported here. This includes the research design and the methodological approach. Second, comprehensive theoretical reference establishes how far the present research differs from other literature on foster care. Based on our research findings, the main body of this article argues that *familialization* is not simply a “natural phenomenon,” but a structure actively produced by those involved. Of interest on this level are public authorities, foster children, and foster parents. How do public authorities manage to delegate responsibility to foster parents and foster children, and how does this mandate, namely, to be and to have to be a family from the day on which placement begins, affect the lifeworld of those concerned?

This article discusses the significance of this form of familiarization—understood in terms of the above definitions as the delegation of responsibility to foster parents—for the life course of foster children. Based on the specific forms of intervention, coordination, and cooperation between families of origin, foster families, and public authorities at the key transitional points—*entering* and *leaving* foster care—analysis illuminates the

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2. “Unterstützungspotentiale professionell begleiteter Pflegefamiliensettings im Lebenslauf von Pflegekindern,” SNF-DORE Project 1.11.2011–31.11.2013, Project director: Annegret Wigger; research director: Monika Götzö; research associates: Nicolina Stanic, Claudia Nef, Sylvia Beck, Helena Morf. The project was funded by the Swiss National Science Foundation.

effects of “this foster family setting”<sup>3</sup> on the lifeworld. Precisely these key transitions bring into clear view the forms of cooperation, coordination, responsibility, and referral involved. As shown below, the responsible government agency does not withdraw from a foster child’s family context even though its presence is not directly tangible in that lifeworld; rather, it remains present in a more or less concealed way. This, in turn, produces specific dynamics that those concerned must deal with individually, with great emotional commitment, and with strong feelings of uncertainty as regards their individual and social position.

Finally, this article summarizes the importance of this specific figuration for the social integration of former foster children and refers to the findings of current research on care leavers. This comparison indicates parallels between the present research and the general debate on care leavers. One such parallel is the danger of promoting or rather accepting structural disadvantages for foster children because of how this specific care measure is terminated. This point reveals the contradictions and risks of familialization processes in child and youth welfare.

## 2. Background: Research Design, Methodological Approach, Theoretical Perspective

This article is based on a three-year research project, completed at the end of 2013, on the potentials of support in professionally supervised foster family settings. The research was funded by the Swiss National Science Foundation. Contrastive case studies served to investigate seven different foster family settings based on narrative biographical interviews (conducted with former foster children and their foster parents) and on guided interviews (with legal counsels, guardians, or the representatives of placement organisations).<sup>4</sup> Grounded theory was applied to analyze and theoretically consolidate the case studies.<sup>5</sup> In addition to the individual narratives and their particular rationales, analysis focused on the interaction between the various interviewees, in terms of *doing a foster family*. Particular attention was given to the larger structural, social dynamics manifesting themselves beside specific modalities.<sup>6</sup> Our research design pursued a dual strategy: on a first level, the everyday, lifeworld-related modes of production and coping evident in a particular setting were analyzed; on a second, the implicit societal structures dynamizing and shaping the everyday lifeworld were examined. Following grounded theory (Glaser and Strauss 2005; Staus and Corbin 1996), the interviews were subject to multiple coding and discussed in evaluation groups. Our study concluded with the theoretical consolidation of the empirical findings into a

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3. “Setting” here means the specific constellation between the individuals involved in foster placement.

4. Full verbatim transcriptions of all interviews were furnished.

5. For more extensive theoretical substantiation, please refer to the final project report (Götzö and Wigger 2014).

6. This follows the basic methodological premise of qualitative social research, that reality is socially constructed (Berger and Luckmann 1996).



higher-order theoretical structure. Our guiding question throughout was: what kind of role is played by those involved in foster family relations at the crucial transitions in the life course of foster children? Who provides what kind of support, and how? Which transitions and biographical turning points are described as particularly challenging by foster children? Our orientation toward transitions and turning points follows the theoretical conceptualization of child and youth welfare as part of a life course regime (Walter and Stauber 2013) that is responsible for raising social expectations about the key phases of a life course.

The empirical findings discussed here refer to Switzerland and cannot be generalized without reservation. The Swiss care system provides well-developed outpatient and inpatient facilities (Haberkern 2009: 70), which have established themselves particularly in urban areas. At the same time, liberal and conservative traditions are bringing forth a “light” version of the activating welfare state (Bonoli 2006), in which existing and new approaches merge. Liberal and conservative ideologies converge precisely as regards their notions of the family: whereas liberal circles hardly advocate stronger state intervention in families and instead emphasize the self-responsibility of families, the traditional, conservative model of the family supports a social policy that assumes that families can, and should, help themselves (Bonoli 2006; Bonoli 2010). Put differently: notwithstanding a well-developed care system, traditional, family-based concepts,<sup>7</sup> which blend with new approaches in a complex way, are prevalent. This convergence manifests itself in extremely diverse local variants because the federal structure of Swiss politics stands opposed to centralistic social policy. Failing clearly allocated jurisdiction over new social policies, policy implementation ultimately lies in the hands of municipal authorities (Bonoli 2010). The same applies to the foster care system: until 2013, no precise statutory basis existed for regulating this system. New legislation regulates jurisdiction and responsibilities much more clearly. As of 1 January 2014, the former, mostly lay guardianship authority was replaced by a new Child and Parent Protection Agency (CPPA). The CPPA is responsible for taking placement decisions. Concrete implementation remains in the hands of local authorities (that is, municipalities) or of contracted private placement organizations, and therefore varies considerably (Götzö and Beck 2013; Keller 2012; Wigger 2012). Current debates and legislative adjustments reveal the diffuse nature of roles, tasks, and responsibilities in this system.

The relevant German-speaking literature on foster care pays only scant attention to this situation. The official, governmental side of this specific form of child and youth welfare is discussed solely in connection with placement procedures (Voll et al. 2008; Arnold et al. 2008). The vast majority of publications not only maintain the strict division of labor between a (professional) expert system and the privacy of foster families but also keep these two areas clearly distinct (Gassmann 2010; Sauer 2008; Wiemann

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7. “Traditional” refers in particular to the concept of the family as a nuclear family consisting of a gainfully employed male adult and a female adult, who is a housewife either not employed or only part-time and who is responsible for childcare.

2012; Wolf 2013). Everyday practice and the relevant literature appear to agree that the division of tasks between professional (public) experts and (private) families is feasible. They also concur that there should be as little intervention in foster families as possible, so that these families can unfold their potential within the intimate sphere of the family.

Our study questions this culturally supported conception of families and foster families as “non-state” and as exclusively private. Contrary to the existing literature, we explore the function of such a conception within the transforming, activating welfare state, which is delegating more and more responsibility to the individual subject and to private social spheres (Oelkers 2012: 155). Following Norbert Elias’s concept of figuration as a network of human interdependencies (Elias 1997: 70), foster care can be described as a specific form of interdependent figuration. This concept of figuration enables to consider foster families beyond normative notions of relationships and dependencies, through which the actors of this figuration are interlinked.

Thus, foster families are here understood systematically as part of a public child and youth welfare measure, even though this is not evident in the private lifeworld. As it emerges, this existing figuration develops its own structures. According to Elias, a figuration can therefore be understood as the interaction between structure and process.<sup>8</sup> For the analysis of a concrete foster family setting, this theoretical perspective means that such a setting unfolds its own processual dynamics with the beginning of foster placement, to then develop a specific structure. This dissolves the separation between family and state, or rather makes evident their interdependency, as described by Jacques Donzelot (1980) or Nikolas Rose (1999). In this conception, families do not constitute a lifeworld exempt from government regulation: “The domesticated private family was both to be distinguished from political life and to be defined and privileged by law; it was to be both freed from detailed prescriptions of conduct and to be permeable to moralization and normalization from outside. It was to become the matrix for the government of the social economy” (Rose 1999: 129). Seen thus, families, educational institutions, and child and youth welfare are all aspects of a specific constellation of the life course regime (Walther 2011: 80–81). Child and youth welfare, and foster care, can be understood as a “co-ruler in the life course regime” (Schefold 2001: 1133), on account of its welfare state mandate of helping individuals to cope with the requirements of the normal life course.

In what follows, the phases of entering and leaving foster care are described in order to reveal the areas of cooperation, coordination, oversight, and jurisdiction. Entering foster care brings into view the emerging network of relations and the dynamics unfolding therein. It is these particular dynamics that foster children and foster

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8. Elias’s concept of figuration is used here in two ways: 1. As a concrete unit of investigation, whose limits are determined in terms of specific dimensions of dependency. A figuration, such as a school team, can represent a subfiguration of a larger figuration, such as the school system. 2. As the description of a reciprocal relationship between individuals and society, who are interlinked in a specific way through their respective developmental logic (Treibel 2008 : 46–54).

parents must deal with in their lifeworld. The fact that coping with these dynamics remains limited to an individualized, subjective level and to the immediate lifeworld, as our findings suggest, points to the specific effects of familialisation processes. As the meshwork of relations emerges, state actors and structures “disappear” beyond reach, because they withdraw from the lifeworld, but indeed not from their position as gatekeepers in the life course (Behrens and Rabe-Kleberg 2000). This leads to difficult, ambivalent situations, which present significant challenges for those concerned, precisely because these situations are individualized and frequently psychologized as difficulties typical of foster children (Nienstedt and Westermann 2007). By contrast, our findings suggest that these difficulties are related just as strongly to the familialization of such assistance, precisely because the governmental side of this support system is not visible in the lifeworld, hence making direct communication impossible.

### 3. Results

#### 3.1 Entering Foster Care

The first step of foster care is placement in a foster family.<sup>9</sup> Here the life course regime of the welfare state manifests itself. Public authorities intervene in a family and place its child(ren) in another family, which was previously chosen for this purpose. In Switzerland, either the Child and Parent Protection Agency (CPPA) or a mandated guardian looks for a foster family suited to the child and its specific problems. Guardians as a rule serve as contact persons for the resulting network of relations (birth parents, foster parents, foster child). The guardian is obliged to report to the placement agency on the course of the fosterage. However, the government decision-makers ordering the placement never enter into direct contact with those concerned. Already the search for a suitable foster family shows that state actors have a great interest in leaving families to shape foster care on their own. One interviewed guardian observed: “Unfortunately, foster parents or foster families are a scarce commodity. Well, yes, sometimes it is a bit difficult. (...) Then it is a matter of knuckling down or working out some form of cooperation.” Establishing cooperation refers to the cooperation between foster parents and birth parents. Many placement agencies, but also experts, consider this level crucial for successful foster care. The account of one guardian, who was looking for a family working to a high professional standard to manage an extremely conflict-ridden case, suggests that the responsibility for arranging contacts and resolving conflicts tends to lie with the families:

The situation was so complex that a large foster family able to provide therapy and social education was considered better suited to dealing with the existing conflicts between the parents, particularly between mother and child. To establish contact with the biological parents [...] because, as practice shows, family care, ordinary family care, tends to be so overwhelmed by such complex situations, particularly when the birth parents have expectations or make demands that perhaps overextend the foster parents.

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9. For an extensive discussion of placement procedures, see Götzö (2013) and Götzö and Wigger (2014).

Although guardians recognize the difficulties inherent in the cooperation between foster parents and birth parents, the above-cited statements suggest that as a rule they strive to initiate conflict resolution on the level of the parental couples. Needless to say that conflict resolution on this level is highly charged emotionally. At issue are existential questions about affiliation and legitimacy, namely, which parents are allowed to express which legitimate interests toward a child. Put differently, the government-mandate measure is neither discussed nor is it made a subject for discussion, because placement seemingly naturalizes the lifeworld it creates. Now it is once again a matter of “families.” Practice oriented toward such normative notions of the family demands considerable normalization from those involved (foster children, foster parents, but also birth parents).<sup>10</sup> Normalization requires emotional and relational work, which tests and evaluates the foster relationship and thereby presents a major structural and cultural challenge: foster parents educate a child placed in their care *on behalf of the state*. Our interviews include animated and emotional accounts of how deeply concerned foster children are with questions of belonging and “real love,”<sup>11</sup> and how they yearn for a “normal family.” Multiple affiliation is not so much the key issue: the foster children we interviewed coped very well with having several parents. Respondents distinguished their foster parents (who looked after them during a particular stage of their lives) from their birth parents (who could not manage to care for them). Birth parents were referred to as “real parents” while foster parents were “like real parents.”

Guardians hardly played a role for foster children: many could not recall the name of a guardian or frequent relocations meant that there were different guardians, whose names the children could not keep apart. Most of the former children regarded this as a lack of interest in them as human beings, although they considered the support received to have been helpful: “But then she [the guardian] must also stand by you and just think, well, you know, I have got 27 other brats (...) and, oh, number seven now has a problem.”

Guardians, who are a public authority’s only tangible representatives and exponents, become peripheral figures in the support system not only because of how they position themselves within the foster structure, but also because the powerful decision-makers in the background never come into the picture. Foster children frequently agreed with their foster parents that guardians had no idea about the lives of those concerned and therefore were not legitimated to intervene in the network of relationships. This happened, for instance, when foster care had transformed increasingly into a “normal family.” In one representative case, a guardian’s interventions were interpreted as unnecessary, as coming “from too far out,” and hence as not particularly helpful. This guardian agreed to visit the foster family only if it had any needs, but this was never the case. The fact that the authorities accepted this arrangement was related to how this particular guardian interpreted her own position. Guardians are responsible for

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10. On the dynamics of normative concepts of the family in the foster care system, see 2013.

11. In what follows, excerpts from the interviews conducted with foster children are inserted in the main text for the sake of readability. Full transcriptions are available (in German).

the entire setting and do not see themselves as representing the interests of one of the involved parties, not even the child's. One guardian contrasted his role to family roles:

The reality is that I am not a godfather, nor can I be one in my role as a guardian. Nor am I am mate. I have a specific function. Getting too friendly with the foster family makes me lose credibility in the parents' eyes. Identifying too strongly with the foster parents also makes me lose any credibility. The child must experience and perceive me in my role as a guardian, in a specific function. I am neither a godfather nor a surrogate godfather.

The fundamental problem evident here concerns public jurisdiction, that is, the responsibility of government authorities and their representatives, and as such the functioning of the entire support system. Guardians position themselves at this juncture, where their unrelatedness to the foster families is interpreted and experienced as a lack of interest. Here a split occurs between an outer, bureaucratic support system, which seems not being interested in the individual case, and the support lent by genuine, because emotionally caring foster parents as a source of legitimate assistance. This split engenders far-reaching dynamics for a foster child's further life course. In our interviews, authority-mandated familialization, which foster families are left to carry into practice, seems to be the reason for resisting anything that disturbs the normalcy of a "normal family, and for removing or excluding any such interference from the lifeworld. Thus, almost all the foster children that we interviewed told us that they had discontinued the therapy organized by the responsible authority with their foster parents' consent. Moreover, they rejected their guardians as disinterested strangers, whose ideas or reservations the children branded as illegitimate and ignored as far as possible. Thus, the further support system was edged out of the foster family's lifeworld. Most guardians accepted their exclusion, because they agreed with the foster families that protecting a family's intimacy is a legitimate concern. This view, however, contradicts their mandate to oversee foster care and to monitor a child's welfare. Thus, *doing foster family* becomes *doing family*. Concerning the significance of the government authority in shaping the transitions in a child's life course, the involved adults consider foster placement (that is, entering a foster family) as a solution to a problem. Placement is considered to basically fulfill a government mandate. From a lifeworld perspective, the regulatory and supervisory function assigned to mandate holders such as guardians seems anachronistic, or even as illegitimate for successful placement. One foster father described this as follows:

Well, I have always taken the view that most welfare offices, well you know, I wouldn't expect them to, anyway most [author's note: incomprehensible passage] don't really understand //mhm// it's probably a small number of their clients, and they don't really understand, and I wouldn't expected professional support //well, yes// but that one could work in peace and didn't have to argue over money all the time, but that one simply work on a normal level.

With some few exceptions, the disparaging, discontented, and derogatory remarks made by foster children and their foster parents about the supervisory authorities indicate that the members of foster family internalize the government mandate and consider it their "private business." The authorities are meant to provide favorable conditions, but

otherwise to keep out of the foster relationship. The former foster children consider their parents' rejection of, and their successful battles against, guardians or therapists as a sign of genuine human interest. More pointedly, the less government involvement, the more a foster family's privacy is able to develop. In line with the current specialist debate, it could be argued that professional welfare workers should stay out of a foster family's privacy (Klaus Wolf speaks of professionals colonising foster families, 2013) so that such families can unfold their potential as families.

But this conceptualization could be discussed diametrically opposed, too: concealing the government mandate and rejecting professional "meddling" places a significant strain on the manifold relations within foster families. Questions of affiliation, identity, and love override any concern with the actual structural particularities of foster care. The concealment of measures, by the involved adults, in particular by the responsible authority, together with its withdrawal from their lifeworld, deprives foster children of the possibility of engaging openly and actively with this life phase and with its particular setting as a part of public child and youth welfare. Instead, and to re-emphasize this point, genuine interest and emotional affection are put to the test. Foster children suffer and question themselves: many of the interviewed children were ridden with self-doubt, and asked themselves "am I okay?" Conflicts between foster children and foster parents, as described by the children in particular as regards their adolescence as an extremely difficult life phase, fundamentally destabilize the structure of human relations and identity within a foster family. Under these conditions, foster children may break off the relationship with their foster parents, go into hiding, or make contact with their birth parents. Unless they return voluntarily, the support system barely succeeds in catching these children in its safety net.

In addition to the effects of the familialization-oriented dynamics generated by the support system, which are described here as the highly demanding management of emotions, far-reaching consequences for the children's life course and their social integration become apparent. The fundamental notion of government decision-makers manifests itself on yet another level: the complete absence of an explicit educational and integration mandate for foster parents. Our study revealed that foster placement constitutes no explicit long-term integration mandate aimed at a child's future. The authorities, instead, rely on a kind of "family automatism," which, however, is left unexplained. As a welfare measure, "foster placement" seems to be oriented exclusively toward the family of origin's past and serves to regulate a new present life for the child. But it remains open whether and how the integration expected of families nowadays is assigned to foster parents. This uncertainty is problematic. Some of the foster parents in our sample took great pains to support and promote their foster children during their education, professional training, and career entry phase. However, foster parents were left to rely on their personal notion of successful social integration. Thus, child advancement varied significantly: family support was aimed at psychological stabilization, at attracting the least possible attention at school, or at completing an apprenticeship.

The absence of agreed objectives, which would not only need to be formulated but also government-funded, can be interpreted as a disadvantaging dynamics of the foster care system. More pointedly, the state eschews its role of clearly supporting foster families, as an integral part of the child and youth welfare system, in achieving long-term objectives aimed at social integration. Narrowing the perspective to emotion-centered tasks also means economizing financial contributions. Foster placement remains decidedly more cost-effective than institutional placement. Instead, the authorities rely on the hope that foster parents, owing to their emotional bond with their foster child, will feel obliged to vouch for its comprehensive social integration. One guardian observed: “Well, yes, this is something one always for, or that they [foster children] can somehow strike roots in a foster family, in the sense of establishing a sustainable relationship or relationships.” Sustainable relationships mean that foster parents assume more tasks and thereby commit themselves beyond the limited duration of foster care.

The absence of future-oriented objectives parallels a gap within the literature on foster care. The considerable literature on early intervention, education, the forms of cooperation expected with schools, and later professional integration (Lange and Xyländer 2011) appears to be aimed solely at biological parents and fails to consider foster care. Although this narrow discursive focus on education and employability under the conditions of an activating welfare state must be eyed critically, the absence of this discursive arrangement within foster care is noticeable. The significance of parents promoting their children’s education and professional training, as formulated for biological families in connection with the activation paradigm, does not seem to apply to foster children. Thus, the educational background of foster parents is no selection criterion. Foster families seem to be a “repository” or “refuge,” aimed primarily at protecting the child against the conditions of its family of origin. Whereas this perspective represents a legitimate and important achievement in terms of child welfare, as explained previously it limits the potential of a foster family setting to an attachment- and emotion-centered structure. This, in turn, allows the state to curb the allocation of both personnel and funding. When children leave foster care, this basic orientation reveals a further problem which, as shown below, is also mentioned in the current research on care leavers.

### **3.2 Leaving Foster Care**

Generally, leaving foster care is not a matter of personal choice, but a fact of life determined by legislation. Officially, the state terminates its responsibility for the age-appropriate education of foster children when they reach the age of 18 or complete their initial (occupational) training. Government decision-makers may enter a foster child’s life for the first time when it leaves foster care. They appear in the guise of local authority representatives, who invite the child to the village or town hall to announce that the municipality will no longer bear the costs of foster care. The interviewed former foster children did not describe leaving foster care as a turning point in their lives. Subjectively, our respondents did not perceive the government-defined endpoint as a significant lifestyle change. This suggests that up until that transitional point familialization had

proven successful, as a development explicitly welcomed and desired by guardians. Thus, a foster family often becomes a real family when foster care formally ceases: family members gather for family celebrations or on public holidays, and advice is sought on such occasions. In some cases, foster parents become grandparents, foster siblings real siblings. At least in our sample, there is a tendency toward further consolidating these relationships through kinship ties and terminology. Continuing such relationships, however, can succeed only through maintaining communication and relationships. In the event of conflicts, or when relations break off, foster children are not legally entitled to claim financial or other kinds of support from their foster parents. Foster parents continue to support their foster children, depending on the intensity of the relationship and their sense of duty.

Structurally, the legally defined end of foster care, either at the age of 18 or on completion of initial training, does not coincide with successful social integration in terms of foster children attaining professional independence. With a view to the life course of foster children, leaving care is a life phase characterized by various overlapping processes, such as entering professional life, forming an identity as an independent adult, and trying out one's independence. Precisely this crucial transition reveals the consequences of government (non-) intervention, of lacking objectives, and of the significance of orienting foster toward family structures. Current transitions research suggests that this life phase should not be considered to be a unique passage toward leading an independent life even if socially speaking it brings forth the "young adult." Rather, the school-to-work transition proves to be a holistic, variegated process shaped by different interacting partial transitions: school, vocational training, work, family relationships, gender-related identity, peer relations, and youth culture (Konietzka 2010; Scherger 2007; Walther and Stauber 2007). This transition is described as a prolonged, contradictory phase involving potential reversibility, and during which "setbacks" must be expected. Yet the end of foster care conveys a clear sense of an unequivocal and definite transition: at the age of 18, young people in foster care are discharged into independence by the authorities. What appears to be self-evident in other types of families, namely, the continued child-parent relationship, the hope of not being abandoned, and being able to return "home" in times of crisis, must be negotiated individually in foster family settings and continuously reaffirmed.

Our biographical interviews indicate that the development of foster children does not simply "lag behind" (Nienstedt and Westermann 2007) that of other adults. What emerges, instead, is a situation produced by the foster family setting as a particular figuration that points to definiteness where in effect there is none. Expecting unequivocal outcomes as an independent adult leads, among other things, to assessing "divergences" as non-standard and to attributing these to a foster child's personal shortcomings. On leaving foster care, foster children who first wish to discover whether they can manage on their own or whether living with their birth parents might be an option worth exploring as a part of finding their own identity, at this point in their lives unconsciously endanger the fragile, communication-based affiliation with their foster parents.



Precisely such affiliation, which is produced communicatively and emotionally over the course of foster care, and which constitutes successful familialization, either establishes the basis for continuing the foster relationship or explains its failure. What applies to coping with a normal life course holds true for foster children in particular: still effective standardization and inequality mechanisms can confront young people with conflicting situations, above all in transitional phases, during which they must prove themselves in manifold ways and legitimate their decisions toward the outside world. This, in turn, creates uncertainties about one's identity and position in society. At the same time, coping with the different partial transitions constituting the transition to adulthood presents a significant challenge. "One of the principal challenges of late-modern transitions [...] is to cope simultaneously with the requirements of different transitional areas, which often even contradict each other, but at least follow their own rhythms and rationales" (Walther and Stauber 2007 : 35).

Foster care ends precisely at this culmination point. It is now left to the ability of the young adults and to the goodwill of their foster and birth parents whether and how the existing support system continues. Current transitions research suggests a continued need for support. As a rule, however, such support is neither envisaged nor aspired to by the authorities. Thus, shaping foster care and its structures fails to take up current insights and social developments. These back-and-forth movements toward adulthood extend the obligations of families, which Böhnisch, Lenz and Schröer (2009) have described as the "familialization of transitions." Thus, "In this specific transitional phase, youths still depend on their parents; the detachment process is delayed and family care extended. Here, a familialization of the transition becomes evident: the birth family is compelled to make the transition its own business" (p. 242). Precisely this development favors the familialization practices aspired to thus far in foster care, albeit in a paradoxical way: where few conflicts exist, the family prevails as a support structure; but where there are conflicts, both the family and its support cease to exist.

What emerges as regards the life course regime is that foster children are seriously at risk of suffering structural disadvantages: whereas other young adults can usually rely on broad-based and reliable support, foster children may suddenly find themselves left to their own devices. After receiving government support, they must now tackle the youth-to-adult transition on their own. The end of foster care requires foster children to have particular creative skills. These include the ability and the dexterity to behave as a "biographical actor" with "biographical knowledge" (Heinz 2000), based on previous experience and with a view to pursuing future possibilities and objectives. Where Stauber und Walter (2007) identify the development of biographical skills as a task, among others, for social work, the foster family setting proves both contradictory in this respect and almost overwhelming in relation to the tolerance of uncertainty.

## 4. Conclusion

The study discussed here reveals that entering and leaving a foster family setting involves various overlapping partial transitions. For the foster child, these transitions create a particularly challenging situation. Given the familialization of a government measure and the associated exclusive reference to the lifeworld, the foster child must cope with this challenge on an individual, emotional, and relational level. Whereas affiliation and identity are crucial points of orientation in this respect, they correspond only partly to the initial structure and therefore only function partly as a solution or as coping action. Both the transition into and out of foster care reveal problems that can be related to the familialization endeavors of government authorities. Given the absence of overriding objectives at the start of foster care, relying on foster parents assuming emotionally based responsibility for their foster children can lead to a highly unfavorable life course. Foster families can lose sight of vocational training and career entry if their emotional bond is weak and if the parent-child relationship is conflict-ridden. Instead, questions of affiliation and identity move to the fore. The convergence of leaving foster care with the ambivalent, long-term transitional phase to early adulthood, which is characterized by “setbacks,” points to a further, significant problem of the foster care system: foster care ends precisely when today’s young adults have a particular need for support.

Our study showed that the theoretical, practical, and research-oriented focus of the foster care system on the quality of the parent-child relationship obscures a systematic view of the life course and social integration as two crucial dimensions. On the one hand, the familialization of support, together with the elusive role of government authority representatives in the foster child’s lifeworld, means that those affected hardly think of claiming state benefits or support. Nor do foster children appropriate this life phase in relation to child and youth welfare and thus concern themselves with the support system. Conceiving foster families as normal but special families represents an ideology which, analogous to the (re-)familialization of welfare state arrangements, serves to release the state early on from its dual responsibility: for ensuring that children can grow up appropriate to their age and needs and for enabling social integration appropriate to their life course. Amidst liberal cost-cutting discourses, this ideology seems both correct and viable. This means, however, that the state leaves successful social integration to the emotional bond between foster parents and foster children.

Although celebrated in the literature, a foster family’s privacy and emotional ties need to be eyed critically in this respect. Quite simply because social integration can fall by the wayside should an emotional bond fail. The discussion on “care leavers” at the transition to independence (Köngeter et al. 2012: 262) points to the need for further research and theory-building in the foster care system. Moreover, practice also needs to consider the findings of international research on residential child and youth care (institutions, foster families) (Stein 2006; Walther 2011). Such research calls for shifting existing support structures toward more “aftercare.” Most strikingly, child education services ignore the generally altered modes of transition and still orient the

provision of help, and its end, toward the age norm of 18 years, that is, when foster children come of age. This life phase is hence described as a status passage, “in which an accelerated transition to adulthood is institutionalized and thus imposed on young adults” (Schaffner and Rein 2013: 264; see also Rosenbauer 2013; Stauber 2013).

The foster care system has analogous desiderata and gaps. Along the lines of the proposals formulated so far for youth welfare, foster children must not only receive stronger support on their way toward independence, but such support must also remain keenly aware of their participation opportunities (Rosenbauer 2013; Stecklina and Stiehler 2006). Thus, the foster care system, as a part of child and youth welfare, falls in step with this problem, without this alignment being reflected in the relevant literature or in practice to date. And yet foster children are at risk of suffering structural inequality, which they cannot simply compensate for. Given the emotion-focused nature of foster care, they are challenged to establish unequivocal affiliation on a daily basis. Doing so may induce great uncertainty about identity-formation, role models, and ideas about the future. Our findings suggest that the foster care system needs to be seen as a figuration, in terms of the manifold interactions between different stakeholders, such as foster families and birth families, government authority representatives and experts, and other socialization agents important in the life course. This perspective would enable individuals to continue claiming government support, which is currently undergoing transformation, rather than such assistance being excluded from their lifeworld.

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Vesna Leskošek, Srečo Dragoš

## **SOCIAL INEQUALITY AND POVERTY IN SLOVENIA – POLICIES AND CONSEQUENCES**

*ABSTRACT: The article presents an analysis of the main political attitude to poverty and social inequality which has an influence on the creation of social policy, and specifically focuses on the policies of economisation, minimisation and stigmatisation aimed at the increased acceptability of social inequalities and reduced significance of poverty; this in turn helps the state neglect the investment of adequate resources to do away with poverty. This state of affairs is illustrated by statistical data on poverty that offer enough information to conclude that poverty needs to be faced immediately while its abolition is still possible instead of letting the poverty level increase and the fight against it become ever harder.*

*KEY WORDS: capitalism, inequality, social policy, transition, poverty*

### **Družbena neenakost in revščina v Sloveniji – politike in posledice**

*IZVLEČEK: V članku je predstavljena analiza glavnih političnih prepričanj o revščini in družbenih neenakostih, ki imajo vpliv na oblikovanje socialne politike. Še posebej se usmerjamo na politike minimaliziranja, ekonomiziranja in stigmatiziranja, ki imajo namen povečati sprejemljivost družbenih neenakosti in zmanjšati pomen revščine, kar povratno pomaga državi investirati potrebne resurse za izkoreninjenje revščine. S predstavitvijo statističnih podatkov o revščini avtorja podkrepita argument, da se je treba z revščino soočiti nemudoma, saj jo je ob nizki stopnji še vedno mogoče odpraviti. Če jo puščamo rasti, je spopadanje z njo vedno težje.*

*KLJUČNE BESEDE: kapitalizem, neenakosti, socialna politika, tranzicija, revščina*

#### **1. Introduction**

During the last twenty years, poverty has become an increasingly important topic, what can be attributed to the fact that Slovenia was joining the EU. As a part of international community, Slovenia has assumed the substances and forms of reporting on the situation recorded in individual fields, among others on poverty and social

exclusion. In 2000, the Programme on the Fight against Poverty and Social Exclusion was adopted and in the same year the first report on the implementation of the said programme was drawn up. In 2003, Slovenia adopted European form of conduct in the field of poverty and social inclusion, named Joint Inclusion Memorandum. Since then numerous governmental documents were produced to either plan or to report on poverty in Slovenia.

In this article we address the changes in the understanding of the welfare state in Slovenia. The main research question concerns the consequences of subordinating social policy to economic policy, which, on the one hand, leads to the curbing of social rights and, on the other, increases poverty. Strategies used for strengthening the common believe that economic policy is the most important and all other field should be subordinated are directed to labelling social welfare recipients as fraudsters to receive support for lowering the level of social rights and to portraying public sector as inefficient and costly. To show how the welfare state has been turned into a punitive state, we use the case of Slovenia and changes in social policy that stipulate the level and the scope of social rights.

We also discuss the transition from socialism to capitalism. We are interested mostly in what are the consequences of privatisation and denationalisation in regard to social inequalities. The type of capitalism that was developed in Slovenia can be described with the use of Fulcher's classification (Fulcher 2004) on Swedish, American and Japanese type of capitalism. Slovenia moved towards the American type that was remarkitized in 1980s and 1990s. Fulcher argue that: "Keynesianism was abandoned, government expenditure was cut, some industries were deregulated, some services privatised and state welfare reduced. [...] The Reagan administration of the early 1980s than sought to stimulate market sources by cutting both taxes and governmental expenditure [...]. The deregulation of the airlines marked the first brake with the New Deal tradition of the industrial regulation and was followed by the deregulation of the railway, trucking, telecommunications and the electricity generation. The publically owned part of the railways, and many state-run local services and prisons were privatised. A welfare-to-work programme, which became a model for New Labour in Britain, limited the duration of welfare payments and forced recipients into low-pay works" (Fulcher 2004: 68). There is a tendency of privations of public sector in Slovenia and the social protection is based on workfare paradigm, significant for the USA but also the EU in recent times.

The structure of the article is as follows. We first explain the historical development of the Slovene social policy from the early nineties till now to enable the readers to understand better the current developments. The main sources of analysis are governmental policies since 1992 (policy papers, legislation, argumentations on measures or explanations of their perceptions and views on poverty). Than we analyse policy documents in relation to their ideological and political origins, we focus mainly on the impact they have on social inequalities and poverty in Slovenia.



## 2. Back to the past

For a long time, Slovenia maintained a rather satisfactory level of social protection which enabled most of the population with low income or without it to remain above the poverty threshold. The first three years of transition were the major risk for poverty in Slovenia. Gini's coefficient (methodology used in Slovenia until 2000 was 50% of the average equivalised household expenditure) in 1983 stood at 0.234, in 1993 at 0.272, and in 1998 at 0.242. Deterioration in the situation may be attributed at least to three processes, i.e. denationalisation, early privatisation and collapse of heavy industry. The same period also saw the lowering of the value of social allowances in cash which, for almost one decade, remained at the same level and did not grow in accordance with the inflation rate. In 1993, the most threatened were households where nobody was employed, with social benefits representing the principal source of income, then single households comprising one member older than 65 years, and tenants living in private dwellings. The majority of poor households comprised female-headed households. In 1993, poverty rate in such households was 15.1%, and 11,7% in male-headed households (Hanžek 1998).

In 1995, Slovenia introduced the minimum wage, which was fixed at 40% of average wage and should be adjusted to the growth in prices in the same manner as wages are. Introduction of the minimum wage has mainly resulted in reducing the depth of poverty. It represents the poverty threshold, causing the allowances in cash to grow. Although the rate of absolute poverty is not known, the estimates (given the registered number of those receiving allowances in cash) including 4% to 6% of the population apply.

In the nineties poverty in single older people has been on a downward trend, whereas poverty in families with children has risen (Javornik and Korošec 2003: 27). The gap between male and female poverty increased, poverty mainly affects single women living with children. Regional disparities were growing as well. Regions in the East of Slovenia are becoming poor, which is manifested both in the number of those receiving allowances in cash and in unemployment rate. In Slovenia, some 3% of the population receive social allowances in cash, of which 6.3% in the Pomurje region, 5% in the Celje and Maribor regions, 1.1% in the Primorje region, and 1.4 to 1.6% in the Ljubljana and Kranj regions. Distinctive disparities between East and West are evident, and are also proved by unemployment data. As the former (socialist) policy aimed at reducing regional disparities was abandoned upon the collapse of socialism and the new one has not become operative in the thirteen years of independent state, regional differences are still growing.

## 3. The decade of back and forward

The decade from 2000 on was marked by the accession process. Part of it was also adopting collection of data and measures of poverty to the EU requirements. The main source of data on relative poverty is collected on the basis of the EU-SILC annual study on income and living conditions, although it focuses on the inequalities

in the distribution of income rather than on poverty. According to the data furnished by the Statistical Office of Slovenia, the-risk-of-poverty rate was declining for several consecutive years.

**Table 1: The risk-of-poverty-rate by gender**

	Income excl. income in nature							
	2005	2006	2007	2008	2009	2010	2011	2012
Total	12.2	11.6	11.5	12.3	11.3	12.7	13.6	13.5
Men	10.6	10.3	10.0	11.0	9.8	11.3	12.2	12.5
Women	13.7	12.9	12.9	13.6	12.8	14.1	15.0	14.6

Source: Statistical Office of the Republic of Slovenia

A significant increase was noted in 2008, when the at-risk-of-poverty rate rose from 11.5% to 12.3%. This increase cannot be attributed to the crisis, since the study on income and living conditions was conducted in the first half of 2008, when Slovenia still recorded the 6.2% economic growth, while the income taken into account in this study was that earned in 2007 when there had still been no mention of the crisis. The greatest increase in poverty was therefore observed during the year in which Slovenia experienced an economic boom and the Slovenian media were publishing the lists of the wealthiest people in the country.

An increase in poverty during the period of economic growth indicates an inadequate redistribution of sources preventing poor people from gaining some benefit from the welfare generated by economic growth. As a matter of fact, the necessity of economic growth is most often explained by the need to create general welfare. During 2010, the European Year of Combating Poverty and Social Exclusion, the European Commission pointed out that general welfare has effects only if all people can partake of it. Therefore, the question that imposes itself is why poverty in Slovenia increased during the period that saw an increase in the general welfare. The answer is simple and evident – the responsibility lies with the structural reforms set out in 2005, in the document entitled *Reform Programme for the Implementation of the Lisbon Strategy* and explained in more detail in other documents that followed<sup>1</sup>. The economic and social reforms planned by the government were met with a strong public response, including one of the greatest trade union protests, several panel discussions and forums, and the publication of a monograph entitled *Pogledi na reforme (Perspectives on Reform)* (Toš 2005). These developments led the government to abandon the planned measures aimed at reducing the redistributive role of the state, among these the single tax rate, the minimal regulation of the market, flexibilisation of work without adequate protection and the privatization of public services. This left an impression that the government dropped the plan in its entirety, which later proved untrue. While it indeed relinquished the most notorious parts of structural reform, it insisted on the changes in the system

1. Also look at The Framework of Economic and Social reforms for Increasing Welfare in Slovenia, 2005; National Development Programme 2007–2013, and Reform Programme for Achieving the Lisbon Strategy Goals in Slovenia 2008–2010.

of social protection, which found expression in the Social Assistance Act that came into effect on 1 January 2007 and made cash benefits less accessible.

In 2006, the average monthly number of cash benefits was 52,910; in 2007, this figure dropped to 43,179, and in 2008 to 36,355. In the crisis year of 2009, the number of cash benefits increased only a fraction – it rose to 41,286. The greatest increase was recorded in the number of extraordinary time-limited cash benefits and one-off cash benefits.<sup>2</sup> The number of regular benefits, on the other hand, has been steadily decreasing over the past few years despite the crisis. It should be emphasized that the drop in the number of cash benefits during 2007 and 2008 should also be attributed to an increase in the employment rate, but not exclusively. Proof is the declining number of benefits paid out over the past few years despite the ever increasing unemployment rate that is a consequence of the economic crisis - in February 2011, 55,201 people received cash benefits, while in October their number fell to 48,832.

#### 4. The years of moral judgments

The Social Assistance Act (Ur. l. RS: 61/2010), adopted by social democratic government made the terms of accessing social benefits even more difficult to meet and introduced greater control over beneficiaries. As a result, professional services are having at their disposal as many as 30 databases containing data on beneficiaries, which they will access directly using a special (expensive) software. The person who claims a benefit has to sign that he/she allows the social services to use such database otherwise they are not entitled to benefits. The criminalization of beneficiaries certainly played a part in this, given that the law was based on the argument that it was necessary to prevent cheating and abuse. Actually the whole public promotion of changes was based on the campaign against thieves, fraudsters and those that abuse the welfare state. We should not overlook the fact that the law was formulated and passed by the social-democratic government which won elections on the premise that the preceding, right-wing government had been excessively neo-liberal. As a matter of fact, the preceding government had passed reform documents that were explicitly based on the neo-classical economic paradigm.

Let us give just a few examples of the extent of fraud prevention in the new law. Single mothers<sup>3</sup> have to prove that they are truly single, but it is not clear how they can do this. Income embraces practically everything, including humanitarian aid (if not declare the purpose), charity, the aid provided by local communities and the like, if the purpose of the aid is not strictly defined. The number of fault-based grounds (a new term introduced in 2010) that can prevent the allocation of social benefits increased to over 30, most of them relating to employment or the manner in which someone has lost his/

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2. The Ministry of Labour, Family and Social Affairs. Statistics: [http://www.mddsz.gov.si/si/uvljavljanje\\_pravic/statistika/denarna\\_socialna\\_pomoc/](http://www.mddsz.gov.si/si/uvljavljanje_pravic/statistika/denarna_socialna_pomoc/) 6. 12. 2011

3. The measure applies to single parents, most of whom are single mothers. After the break up, they are more likely to experience poverty or the decline in their economic and even social status.

her job. For example, individuals who have not completed the probationary period are not entitled to social benefits, nor are those who were dismissed unjustifiably but failed to take legal steps to protect their rights. Among other things, humanitarian and charity organizations are obliged to report every aid given to individuals, since it is counted as income. With each group of benefit recipients, the state claims inheritance rights.

The campaigns that preceded the passing of the two laws mentioned above were based on the argument that it was necessary to prevent cheating rather than on the necessity of preventing poverty. The representatives of the Ministry of Labour, Family and Social Affairs and the Minister himself spoke of a high percentage of cheaters, believed to be between 18% and 20% (Marn 2010). Put differently, one fifth of all Slovenes who applied for cash benefits were accused of cheating. The government was thus promoting the opinion that social benefit recipients were criminals by nature, seeking in this way consensus for the curbing of social rights. It is necessary to emphasize that in reality there is no evidence that social assistance has been abused. The percentages have been invented. There is no statistics on errors or on fraud. Data from the UK and Ireland show that abuses amount to no more than 1%, including some system errors<sup>4</sup>.

## 5. The politics of social inequality

We have presented main changes in social policy in the last two and a half decades, because social policy reflects the attitude of the government towards the social problems and also reflects the political consensus on the basic principles and the broadness of the state intervention. In order to understand the changes, we must illuminate its roots, which go back to the very beginning of the political changes at the beginning of the 1990's.

Transition in Slovenia denotes the abolition of socialism and adoption of the capitalism and the European legal system. It is supposed that whatever has been characteristic of socialism is not compatible with Europe. One of the important differences between the previous and present system is the understanding of social inequality. The difference may be briefly summed up as follows: socialism rejected inequality because it did not understand it, while the capitalism of today "thinks" that it controls inequality simply because it recognizes it (Dragoš and Leskošek 2003: 23). This aphorism may be broken down into three basic assertions, which after more than two decade of transition already function as if they were self-explanatory, or something that does not need verification and with which we must come to terms. These assertions are:

1. Through the transition period we enter the era of the market economy, so an increase in social inequalities is inevitable, since in the previous system this inequality was not sufficiently big; regardless of how we evaluate this increase, positively (as a just expression of meritocratic principles) or negatively (as an undesirable price of transition), it is a fact that in introducing a market economy we cannot avoid an increase in inequality.

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4. <http://iwastoldtheredbegin.wordpress.com/2012/11/26/debate-points-welfare/>

2. The type of social inequality present in Slovenia is acceptable and unproblematic. There are two reasons for this: inequality in market-competitive circumstances is necessary and useful as long as it is not too large; the level of inequality in Slovenia is not too high, since it is below the European average which is in turn lower than the average on other continents.
3. The inequality in Slovenia is too low what has a devastating impact on motivation of well trained and educated people to work even more, to be creative and to be willing to stay in the country. It also contributes to welfare spending that produces welfare dependency and contributes to unemployment because people on benefits do not want to activate themselves. Lowering welfare spending and minimising state sector will provide the economy with sufficient resources to increase employment and investments in research and development what will contribute to economic growth and wealth for all.

All three assertions are basic premises of social policy since Slovenia gained independence. Construct 1 is an expression of the policy of economisation, the construct 2 of the policy of minimization and the construct 3 of the policy of stigmatisation.

### **5.1 The policy of economizing**

Studies of enterprise in developed market economies over the past twenty years have shown that money is by no means a sufficient, let alone the sole motivator for achieving better work results. Once this was established, management theories began to place more stress on the human factor, as well as on other, non-material methods of stimulating better work results (Herzberger, Mausner, Snyderman 1959; Herzberger 1987). Accordingly, enhancements to compensation plans that were aimed at closely reflecting the contribution of the individual, proved unreasonable, because they had no effect on practical operation. Even decades ago a typical feature of American management was an almost inversely proportional relation between the income of the company's executives and the company's success. In the year 2002 the American economy has been witnessing bankruptcies of unprecedented numbers. The bankrupt companies, which forged their balance sheets, are precisely those with the biggest executives salaries (e.g. Enron, World.com, Xerox and so on). Similarly, in other working environments where employees have ostensibly expressed the highest dissatisfaction with salaries, research has shown that criticism was actually pointed at issues other than the level of salaries (Černetič 1997: 75). When in 1949 Glass (in Goldthorpe 1985: 151) conducted a study on social mobility in Britain, the result was a "three-thirds structure": one person out of three moved up on the job status ladder (compared to the status of the father), one out of three ended lower on the ladder, and one out of three retained the same status. Further comparisons, made by Glass, showed that a similar structure is characteristic of all societies at a comparable stage of industrialization, including communist societies, meaning that social mobility is not related to private or social ownership. The fact is that intergenerational comparison showed that only one third of people in capitalist societies have opportunities to improve their social position. This means that precisely within the most sensitive area in which socialism was expected

to demonstrate its advantages over capitalism, i.e. elimination of exploitation leading to better motivation to work not much has changed. Had it been otherwise, upward mobility would be higher and inequality among people lower. On the other hand, the same conclusion is a critique of the capitalist method of income distribution. The assertion that capitalism is more human owing to the market principles that enable every human to be the architect of his/her own fortune (and failure) (Hayek 1960), in contrast to socialism where everything depends on the Party, does not hold judgement. In fact, precisely at this point the differences between socialist and capitalist economies are the least important; and that is quite contrary to what is implied by construct 1.

The World Bank statistics for the 1960s and the 1970s – a period that was quite favourable for both capitalist and socialist economies – show that the level of social inequality is not dependent on the capitalist or socialist orientation of national economies, but on the distribution of wealth which, in turn, is not related to the level of productivity. For example, in Sweden and Norway, the most egalitarian societies, the top tenth of households accounted for 21.3% and 22.2% of the total income respectively; in the US this percentage was 26%, while in other west European economies this proportion was considerably higher, particularly in France, West Germany and Italy where the richest one tenth of households accounted for more than 30% of the total income. In Yugoslavia the share was 22.5%. The positions further down the list were occupied by less developed economies like India (35.2%), Turkey and Peru (around 40%), Brazil (more than 50%) etc. Even then it was already clear that extreme inequality was not an inevitable social phenomenon. For example, in countries which rose above the designation of underdevelopment through the accelerated promotion of a market economy, for example in Taiwan and South Korea, the wealthiest tenth of the population accounted for 24.7% and 27.5% of all income respectively (Goldthorpe 1985: 152).

Therefore, half way through the cycle of industrial development the level of inequality in socialist Yugoslavia was fully comparable to that in Scandinavian countries, which at that time were highly industrialized compared to socialist countries. At the same time, many highly industrialized countries had a considerably higher level of inequality than did socialist Yugoslavia. This means that inequality is not related to socialist or capitalist national economies; nor to their dynamics; nor to economic success in general (measured by income per capita); nor to industrial modernization; nor to post-socialist transition. Inequality does not correlate with the stage of development, productivity or similar, and this assertion holds true on national as well as local levels (inside companies). This, of course, does not mean that material stimulation is unimportant, but it does mean that it is not the most important factor. Many other issues are of vital importance including whether people are paid at all for their work and whether they are given the opportunity to work.

Poverty is related to inequality in that inequality is a prerequisite for poverty, but not also vice versa. Three dimensions ought to be stressed in relation to this (Alcock 2006, Lister 2004, Dragoš and Leskošek 2003):

- inequality in accessing the most important material and symbolic assets can drive into poverty the most vulnerable population categories (those least equipped for market competition);
- not every inequality leads to poverty (e.g. inequality in material assets between the upper and the middle class and within these classes, or inequality within a company, or in the distribution of political power, reputation and the like);
- every type of poverty is a product of social inequality.

We should not forget that until the 1980s inequality in the distribution of wealth and income in most western countries was actually decreasing compared to the period preceding WWII. Of course, the US was an exception and made an unique paradox (Giddens 1993: 224). The reversal occurred in the 1980s with the appearance of the new right (Reaganism, Thatcherism and now Bushism). Rather than by any specific logic of capitalism, the reversal was brought about by voluntary reductions in social expenditures, higher taxes on low incomes and the lowering of taxes on higher incomes. This is the reason why in Great Britain in the mid 1980s the members of the top decile possessed more than a half of all the wealth (ibid: 233). To justify this by means of economic “objectivities” would be an ideology. What is at play here are interests and power.

## 5.2 The politics of minimizing

Is the present level of inequality in Slovenia critical and impermissible? Can it be removed? Construct 2 states that it is not critical. However, today Slovenia is able to eliminate the severe material deprivation that according to some estimates affects between 4% and 6% of the population<sup>5</sup>. It could use existing resources and institutional mechanisms. The same could be said of relative poverty, only that in this case it is not possible to talk about its elimination, because the definition itself presupposes the existence of inequality; in other words, if someone’s income is above the average, then someone else’s income has to be below that average, meaning that a certain portion of the population can still be categorized as poor. Nevertheless, the number of the relatively poor can be reduced to a minimum for which it would even be possible to find economic justification. The means that would be used to ameliorate poverty would not reduce the wealth of the wealthy, while at the same time it would increase the buying power of those who previously did not have it, thus creating new opportunities for those already wealthy to increase their wealth even further.

According to official assessments, over the past twenty years approximately 13% to 14% of Slovenia’s population live in poverty – poverty is here understood in its relative sense (as 60% of the equivalent cash income median). Because of the favourable comparison with European figures, no one deems the degree of poverty in Slovenia to be problematic. In fact, poverty in Slovenia is problematic, and at least five arguments can be found in support of this assertion:

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5. Taking the number of welfare cash benefits recipients or statistic on material deprivation available at SORS: [http://www.stat.si/eng/novica\\_prikazi.aspx?id=5743](http://www.stat.si/eng/novica_prikazi.aspx?id=5743) (24. 6. 2014)

- It is unjust (according to the Rawls' criterion (Rawls 1992)). This assertion holds true regardless of whether the proportion of the poor in the population is relatively small or large. Actually the lower limit of poverty has never been established, that is to say, the limit above which poverty can be taken as just and acceptable, and below which it is unjust and unacceptable.
- It implies an unjust form of social inequality, which is even more unacceptable if its level is below EU average. The reason is that a low level of inequality could be eliminated without much trouble and excuses are harder to find, while the opposite holds true of societies with large, or even major, shares of their population living in poverty. Therefore, the responsibility of political actors is inversely proportional to the level of poverty: it is greater in more affluent economies than in less affluent ones, and similarly, it is greater in countries with smaller shares of poverty than in those with larger shares.
- An essential reduction of poverty would have a beneficial effect on people's adaptation to the market economy, because the reduction in existential risks would increase career flexibility (which continues to be low in Slovenia).
- Owing to the socialist past, Slovenian public opinion still declines inequality. This could create a good political climate for the serious handling of poverty.
- In spite of the relatively low share of poverty, trends in Slovenia are not optimistic, the at-risk-of-poverty-rate in Slovenia is constantly raising.

Throughout the transition period in Slovenia, active control over the social and economic sectors (The Ministry of Labour, Family and Social Affairs) has been mostly in the hands of the left or left-centred political parties who, during the introduction of market reforms, invariably stressed the importance of social values. Despite this, the dimensions mentioned above have been stubbornly ignored. In the long run, such benevolence will incur considerable and unnecessary social expenses. Example: in all reports on poverty that were always explicitly optimistic, the government boasts its success in this area stating that "social transfers are explicitly targeted at the groups that are most vulnerable in terms of income" (MDDSZ 2002: 14). This is a typical tautological argument because we all know that the term "social transfers"<sup>6</sup> denotes that part of the state's financial aid to the socially threatened groups that is based on social (and not market) criteria; this is the reason why, for example, stimulation of enterprise or defence expenditures are not called social transfers (even though they have the same purpose and the same operational forms). The assertion that social transfers

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6. Zygmunt Bauman draws attention to the effects of the selective, means-tested services, that "immediately split communities into those who give without getting anything in exchange and those who get without giving" (Bauman, 2005: 50). He then gives the example of a statement by David Blunkett, the former minister in Blair's government, who in a letter to the *Guardian* "reduced the welfare state idea to passing cash from one section of the community to another." (ibid.) Later on, this "passing of cash" became a "transfer" and social rights became social transfers, implying that money is taken "from the energetic, successful and thrifty to give to the idle, the failures and the feckless" (Boyson, 1971 in Bauman, 2005: 50).



are targeted at the groups that are most vulnerable in terms of income may be used as self-praise in any circumstances, whether those of low levels of poverty and generous social transfers, or those involving high poverty and extremely low and limited social transfers. Of course, the question here is not only whether social transfers are “targeted” at the socially most vulnerable groups, but also whether they reach those groups and what in fact a social transfer means in Slovenia, a “welfare country” by constitution. Do all social transfers reach the socially most vulnerable group? In the report quoted above the government stresses the importance of education, which is expected to reduce poverty in the long run, while at the same time one can see that throughout the transition period the scholarship policy conspicuously favoured the richest sectors of the population and not the poorest. The sum total of scholarships received by the top decile with the highest income is higher than the total received by the bottom decile with the lowest income. Such a state of affairs characterized the entire period of transition and it is still in place (*ibid.*: 15). Therefore, it is not by chance that selection among students is explicit and that it is primarily based on the level of education attained by parents; this feature was typical of socialism and it is no different now (compare the earliest research on this topic, Makarovič 1984 and the recent one, Flere and Lavrič 2002).

To return to the transfers that supposedly resolve poverty, we should not forget to mention the biggest “social” transfer of all times: denationalisation. Slovenia was the only country in the world that carried out 100% restitution of expropriated property including feudal property. Both the intention and the consequences of this measure deserve attention. The intention of denationalisation was precisely “social” transfer, to use the term employed by the state administration. The return of the property expropriated after WWII, as well as the feudal property that was taken away in the pre-socialist era i.e. by the bourgeois regime of old Yugoslavia, was introduced with the intention of repairing wrongs and establishing just circumstances. Or, in Rawls’ jargon, the denationalisation legislation was aimed at re-instituting the type of inequality that is defined as just because it rights the wrongs suffered by the people who were discriminated against in the past (they were denied their right to property) and who have been underprivileged all the while (viewed from the perspective of market competition). And what is the effect of this measure? Slovenian society became stratified anew and to a considerable extent, but stratification is based on pre-industrial criteria that are typical of feudal and caste-based societies that rest on inherited status. We have ended with an entirely new class of the rich who became rich by birth (or rather, by being born in a dispossessed family), and not through their own work. This is suggested by the data in the table 2 which shows the ratio of salaries and property income between the poorest tenth of the population and the richest tenth of the population, by periods: under socialism, at the beginning of denationalisation, and at the end of the post-socialist transition.

**Table 2. The effect of denationalisation law on the increase in income inequality in transition (in %).**

Deciles	Income: 1983		Income: 1993		Income: 1997-1999	
	From employment	From property	From employment	From property	From employment	From property
10% the poorest	2,2	2,2	1,9	1,4	1,8	0,3
10% the richest	17,5	17,6	21,2	67,6	21,3	62,5

Source: Čeh (2001), MDDSZ

It is obvious from the table 2 that inequality within the existentially most sensitive areas (income from labour and income from property) increased perceptibly. The crucial reason is not the level of salaries even though the salaries of the richest increased throughout the transition period in contrast to the salaries of the poorest groups, which decreased during the same period. The main reason for such an increase in inequality is denationalisation. Thanks to denationalisation, property income in the top decile increased from 17.5% of the total income to as much as 62.5% ,while by the end of same period even the modest 2% of income from property, still possessed by the poorest in 1983, slipped from their grasp. When pointing out these facts we must be aware that we are talking about the initial impact of denationalisation. Therefore, the main results of denationalisation are still to come. In this light we should also evaluate the data about the relatively low level of poverty, below average if compared to Europe as a whole.

### 5.3 The politics of stigmatisation

In the period from 2005 Slovene social policy has changed not just as a result of EU accession process but mostly because neo-liberal politics on social inequalities were mainstreamed into the state policy. During the past decade we have been witness to radical changes that affected the welfare state in Slovenia. The reform documents (see footnote 1) mainly focus on three tasks: the creation of one entry point for all social “transfer” claims, the common database of social transfers in cash, and the establishment of a more just and transparent system of social transfers. The necessity of these changes is based on the dominant belief about the psychological makeup of social aid receivers and the current system of social protection. Social cash benefits recipients are assumed to be passive and to lack initiative and motivation. These characteristics are believed to be part of their personal makeup but also a result of the “generosity” of the welfare state that allegedly supports or even creates such behaviour. The stereotypes about people without employment are created with a clear goal in mind, that is, to spread the view that these people are themselves responsible for being without jobs, or even that they maintain status quo without bad conscience. To reinforce such convictions, the reform strategists resorted to discourses that lead to the criminalization of the receivers of social aid. One such discourse promotes the view that they unjustifiably accumulate money and make advantage of the system. Another argues that they cheat and abuse the system, while still another focuses on their allegedly pathological dependence on

cash benefits. This was reflected in the text accompanying the bill on social security benefits that was passed into law in 2010, which read as follows: “The longer the period of receiving social benefits, the more dependent on it the receivers are. They find it increasingly difficult to accept work that is offered to them because this implies a great change in their lifestyle developed during the long period of receiving social benefits.” Accordingly, it is believed that it is possible to prevent such dependence by implementing certain measures. The three discourses mentioned above furnished the basis for the arguments in favour of the curtailment of social rights and restrictions on access to these in 2010, when the Exercising of Social Rights Act (Ur. l. RS: 61/2010) was publicly debated.

Access to social rights had already been made more difficult when the Social Assistance Act was amended in January 2007 (Ur. l. RS, 3/2007), introducing a series of new conditions for obtaining social aid as well as reasons for exclusion. Among the novelties was a restriction on the savings account sum and the value of a car; the beneficiary’s apartment was taken into account when calculating income, although only that part that exceeded the minimum requirements for a suitable living place<sup>7</sup>. The law introduced ten reasons for which a claimant fulfilling other criteria could be excluded from the social aid scheme; most of these related to the way in which a person lost his/her job. The compulsory (forced) work as a legal category was also introduced, meaning that receivers of social aid who cannot find a job must work for humanitarian or charity organizations. The introduction of forced work was a turn from social rights to restitution. By performing any kind of work, either paid or unpaid, the receivers of social aid return at least a part of what the state generously gave to them contributing to their passivity. This ideology is in contrast to the concept of social rights that should be unconditional.

Wacquant’s name for this type of policy is “penalization of poverty” (2003: 65). Police measures and detentions have indicated changes in the operation of western states aimed at excluding everything that does not contribute to the new global order. The underscoring of the need for safety made possible the affirmation of the police and the judiciary as new regulators that replaced disappearing social justice. Wacquant anticipated the emergence of a new, liberal-paternalistic social order – liberal for those privileged ones occupying the top of the social ladder and paternalistic for those at its bottom. It will increase social inequalities and marginalization, while those affected by the curtailment of social rights and unemployment will be increasingly subject to control and punishment. The power of this ideology lies in the weakening of the economic and social state and the reinforcement of the punitive state. In other words, the “invisible hand of the market and the iron fist of the state” complement each other (*ibid.*:68). Inequalities, in fact, reflect the restriction of freedom of poor and oppressed people.

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7. 60 m<sup>2</sup> for the first person in the household.

## 6. Conclusion

In short, the hypothesis on which introductory assertions are based is false: social inequality is not acceptable. Even in a market economy it is neither just nor beneficial because it causes poverty. For the time being, Slovenian society still has the potential needed to reduce inequalities and poverty. It has economic means, a suitable institutional structure, political stability and a prevailing positive attitude among the population. Like British public opinion which, even during the time of economic crisis and during Thatcher's liberalization era, demonstrated willingness to give up financial benefits for the sake of higher social equality (Haralambos 1995: 179), the public in Slovenia reasons in a similar way. At the beginning of transition in 1992, 44% of respondents advocated greater equality of income, and a slightly higher percentage expressed the opposite opinion. Three years later as many as 65.7% of respondents supported greater equality, while in 1998 the percentage of those who thought that inequality in incomes separates people amounted to 92.8% (Toš 1999). Such refusal of inequality has been erroneously interpreted by some as a remnant of the egalitarian mentality inherited from socialism. If this were true, support for equality would decline rather than increase the further away we move from socialism over time. In fact, owing to political propaganda, the public was most prone to approve of bigger inequality at the beginning of transition, but now, having seen the results, it opposes inequality.

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Nino Shatberashvili

## **POVERTY REDUCTION PROGRAMME IN GEORGIA: FACTS AND POLICY MEASURES**

*ABSTRACT: The article analyses the capability of the social assistance programme in Georgia to reach its goal and examines its potential to enable the targeted poor to meet their needs and improve their social functioning. The method used for presenting data includes a literature review, an analysis of reports and the use of the official statistics in the country. The main finding shows that the impact of the benefit varies across the population groups, with children remaining at the highest risk of poverty. Poverty rates vary across regions too, with mountainous regions being in the highest risk group. In June 2013, almost one-third of registered households in the database of socially unprotected families received a targeted Social Assistance Cash benefit. However, we can conclude that according to most benchmarks the programme has succeeded in terms of targeting disadvantaged groups, while as concerns the programme's efficiency and effectiveness there are areas for improvement regarding the coverage, the size and form of the benefit.*

*KEY WORDS: poverty, poverty reduction, targeted cash assistance, social inclusion*

### **Program zmanjšanja revščine v Gruziji: dejstva in ukrepi**

*IZVLEČEK: V članku analiziramo zmožnost programa denarnih socialnih pomoči v Gruziji, da bi dosegel ta cilje in revnim ljudem omogočil zadovoljitev svojih potreb. Metode zbiranja podatkov so predvsem pregled literature, analize podatkov različnih poročil o revščini v Gruziji in uporaba statističnih podatkov, ki so na voljo v tej državi. Rezultati kažejo, da je učinek socialnih denarnih pomoči različen glede na različne skupine ljudi; še posebno visoka je revščina otrok. Stopnja tveganja revščine se razlikuje glede na regije in je najvišja v goratih predelih, kjer je junija 2013 tretjina vseh gospodinjstev prejela denarno pomoč. Zaključimo lahko, da je program uspešno odgovoril na večino potreb, vendar bi za večjo učinkovitost in uspešnost programa morali premisliti o pokritosti, velikosti in oblikah denarnih pomoči.*

*KLJUČNE BESEDE: revščina, zmanjševanje revščine, ciljane denarne pomoči, socialno vključevanje*

## 1. Introduction

Georgia declared independence in 1991. National forces won elections and country was led by President Gamsakhurdia. In tune with country's political changes its economic situation changed too. Prior to independence, the country had a relatively strong economy among Soviet States, with an affluent agricultural sector and energy-intensive industrial products. Post independence armed internal conflicts broke out that reflected on both the country's economy and politics. In the midst of the political tension President Shevardnadze became the leader for coming decade, however in 2003 protests against the fraudulent parliamentary elections led to the Rose Revolution and his resignation. Presidential elections in January 2004 were won by Mikheil Saakashvili. Political and economic reforms were aiming at transforming Georgia to a market-oriented economy. In 2012 the opposition forces won elections. The country entered into the new stage of political and economic life. Revisiting of poverty evaluation methodology became one of the main goals of the new government to combat more effectively poverty and social risks that many households face.

After the Rose Revolution until the 2008 August conflict with Russia the Georgian economy grew by 9.7 percent a year on average. Followed the conflict, GDP annual growth rate dropped to 2.1 percent. However the economy rapidly recovered in 2010 and reached pre-conflict level (UNDP 2013). By the end of 2008, immediately after the August conflict unemployment rate jumped by 3.2 percentage points - from 13.3 percent in 2007 to 16.5 percent in 2008.<sup>1</sup> Self-employed comprise 64 percent of all employed (more than 1 m), and the majority of them are engaged in small-scale farming. The urban unemployment rate (28.8 percent) is four times higher than in rural areas (7.1 percent), due to the fact that all persons residing in rural areas who own a land plot are considered to be employed. During 2009, 36 percent of all households had borrowed money. Less than a quarter of the population in Georgia was covered by any kind of health insurance and this figure dropped to just less than a fifth in urban areas. Free health insurance, was concentrated in the poorest fifth of households but even in these households only just over a fifth of the population was covered (UNICEF 2010). However, the situation has changed to good since 2012. All citizens are eligible for basic health care service.

In the past Georgia's Social Protection system was predominantly categorical, aiming to reach socially vulnerable people according to the categories of vulnerability. Together with those who were in need of such support the system mechanically embedded those who were far beyond such need but within the categorical characteristic. Therefore it was considered to be neither effective nor efficient and was comfortable means for overwhelming corruptions. The need for change was explicit followed by the change in policy orientation. The system changed together with the policy shift towards the targeted social assistance. The reorganization was intensive and challenging however painful process. Currently the system is mixed, comprising of targeted

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1. Statistics Department, Employment and Unemployment. Available from: [http://geostat.ge/?action=page&p\\_id=145&lang=geo](http://geostat.ge/?action=page&p_id=145&lang=geo) (accessed 13. 2. 2014)



and categorical social benefits. Some benefits are flat others depending on the results of the evaluation (to be discussed in details below). However, the policy claims to be more targeted therefore less inefficient and having more impact on the recipients' lives than before. The aim of the article and the main research question is to identify whether the change in the social system ensured to reach its target and to what extent does targeted social assistance enable to improve the quality of life of its recipients.

Besides, due to the endless debate about the causes and predetermined factors of poverty the underlying motivation for the article is to emphasise the complex and inter-sectorally correlated nature of the causes and results of poverty in Georgia to find out if the "victims" of poverty are also actors in shaping their experience of it (Lister 2004 in Alcock 2006: 37) or how systemic barriers contribute to the development or they maintain their poverty. Farmer names (Farmer 2004 in Strier 2009: 1073) as systemic barrier poor educational opportunities, poor health services, low wages, low access to credits, inadequate system transportation and communication, and low access to social participation which results in lack of political power. Many studies revealed, that welfare recipients themselves consider social services as "beaurocratic, dehumanizing and oppressive" therefore forming "coalition of despair" (Dominelli, 1996 in Strier and Binyamin, 2009). In Georgia in addition we can name lack of information not only about the service accessibility but also about the social rights and the means of their utilization. As known the structural views of poverty are oriented more on the change of structural barriers e.i. system rather than poor themselves. However the work needs to be conducted to reorient the people who are predecessors of soviet social system dependency and state monopoly towards self responsibility and self contribution as a vital investment for better future. The poverty reduction policies should aim to create institutional environment empowering poor people to increase social functioning and develop risk management skills (Strier and Binyamin 2010). However poorly structured social services do not offer foundation for the development of "social contract" on which individual responsibility will be based (Weil and Feingold 2002 in Strier and Binyamin 2009).

## 2. Poverty in Georgia: facts and figures

Despite economic fluctuations poverty remains enduring problem in Georgia. The average household monthly income was 374 GEL<sup>2</sup> in 2011, 322 GEL in 2009. The income has been increased by 15 percent however taken inflation into account, the income has been decreased in real terms by 2 percent (UNICEF 2012). Total average monthly household consumption in Georgia is 543 GEL, it was 442 GEL in 2009. Calculation in line with the inflation reflects 5 percent growth in monthly consumption. The Gini coefficient for consumption was 0.38 in 2011, similar to 2009 (UNICEF 2012). According to the official statistics over a fifth (22.1 percent) of the Georgian population lived in poverty and a tenth (9.4 percent) in extreme poverty prior to 2009 (UNICEF 2010). World

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2. 1 EU is equivalent of 2.40 GEL.

Bank Poverty Assessment (2009)<sup>3</sup> provides similar estimations<sup>4</sup>. According to UNDP research *Economic and Social Vulnerability in Georgia* (2013) estimates range from 10 percent for extreme poverty to 45 percent if a less conservative poverty threshold is chosen. Poverty rates vary across regions and population groups. Economic inequality in per capita expenditure distribution between the richest and the poorest, as measured by the Gini coefficient was found to be 0.36 percent (World Bank 2009), and of 0.42 in 2011 (UNDP 2013). The Gini coefficient was higher in urban areas (0.36) compared to rural areas (0.33). Both the average household monthly income and consumption in Georgia is over twice as high in urban as in rural areas (World Bank 2012).

Poverty rates differ across regions too, maintaining mountainous regions at the highest risk group. The social inclusion of targeted poor is under question. With regard to vulnerability to social resources, overall vulnerability rates are low. UNDP research (2013) revealed that only 15 percent of the population does not participate in any kind of association at community level, and only 2 percent have no one that could support them emotionally. Moreover, study state that being poor increases the probability of lacking this kind of support whereas it makes it at the same time more likely to participate in an association. The study states that monetary poverty status is one of the strongest preconditions of the social vulnerability of the households. They have limited access to financial and product markets and less likely to get support from their social network.

There are also disparities in geography of poverty. Poverty rates are higher in rural than in urban areas, indicating that dominant subsistence agriculture contributes to the persisting high number of working poor. Furthermore many people, in rural areas have limited access to basic utilities, social and health services, inequality in terms of employment opportunities and access to education are widespread (EC 2011). The lowest incidence of poverty is found in Tbilisi – the capital of the country (12.9 percent), Samegrelo – one of the western region (14.4 percent), and Kvemo Kartli – one of the eastern region (17.3 percent). The wealthiest regions lie in a continuous arc running from Samegrelo in the north-west to Kvemo Kartli in the south-east. The western regions in this arc (Samegrelo and Imereti – one of the western regions) benefit from favourable agricultural conditions and good access to urban markets and sea ports on the Black Sea. In the east, Kvemo Kartli is favoured by good agricultural land in the south, between Tbilisi and the border with Azerbaijan, and its proximity to Tbilisi and Rustavi (World Bank 2009).

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3. The World Bank Poverty Assessment for Georgia is based on the 2007 Living Standards Measurement Survey (LSMS) and uses consumption per adult equivalent (PAE) as a basis for poverty measurement. Total monthly household expenditure is expressed in per adult equivalent terms using a scale adopted specifically for Georgia. While males aged 30-39 equals one adult, children aged 0-3 years equal 0.98 adults, children 4-6 (0.9), children 7-12 (0.89), and children 13-17 (0.96). WB uses an absolute poverty line and per adult equivalent consumption.

4. 23.7 percent of the Georgian population was poor and 9.3 percent was extremely poor in 2008.

The total rural poverty at 30 percent was much higher than the urban poverty at 18 percent, and the extreme rural poverty at 12 percent was almost twice the extreme urban poverty at 7 percent. One of the south western regions of Georgia - Ajara has the lowest official poverty rate in the country (13 percent) in contrast with the eastern region Mtskheta-Mtianeti which is the poorest (37 percent). The households that have the highest risk of poverty face those households who do not have earners, do not own land, are not composed of only pensioners, and have three or more children (UNICEF 2010).

### **3. Social protection expenditure and (non)take-up**

Georgia's Social Protection system comprises of several social benefits: pensions, IDP/refugee assistance, Targeted Social Assistance (TSA), social benefits for orphans and the blind. Social protection expenditure is the second largest spending item of the central budget. The expenditures in social sphere (education, health, social protection) increased from 6.3 percent of GDP in 2003 to 9 percent in 2007. It accounted for 17.7 percent of the central public expenditure in 2008<sup>5</sup> (UNICEF 2010). Despite consequent economic slowdown post August conflict the government has kept the space of social expenditure growth in total public expenditure – from 34.7 percent to 42.3 percent. Nevertheless, Georgia was one the lowest social spenders in the CEE/CIS region, with only 4.1 percent of GDP spent on social protection, 2.8 percent on education and 1.6 percent on health (UNICEF 2010). Since 2010 despite the decline in total public expenditure from 38.4 percent of GDP in 2009 to 32.1 percent in 2011, which reflects a 5 percent decline in real terms from GEL 7,502 million to GEL 7,110 million, social expenditure has remained steady at about GEL 2,500 million in real terms during this period (World Bank 2012).

Pensions are the most widespread type of benefit in Georgia, followed by TSA and IDP/refugee assistance. Pensions have the highest coverage reaching 53.8 percent of households, followed by TSA (8.8 percent) and lastly other categorical benefits (7.2 percent). Pension spending as a share of GDP is one of the lowest in Europe and Central Asia, though Georgia is at a considerably lower income level than most of the countries with higher pension burdens, and it has an older population structure and higher dependency ratio than those with similar levels of pension spending. Demographic data is not promising forecasting gradual increase of elderly (World Bank 2012).

The Targeted Social Assistance Programme (TSA) was introduced in 2006 with the aim to provide targeted cash assistance to the poor based on the proxy means testing. TSA coverage expanded since then from about 400,000 beneficiaries in July 2008 to about 475,000 in July 2009, and 430,000 recipients (about 10 percent of the population), out of a total 1.7 million individuals registered in the database as of mid-2011 (about 40 percent of the population of Georgia) roughly corresponding to the estimated extreme poverty headcount in Georgia. Increase in coverage was followed by TSA budget

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5. Author's calculation based on the Ministry of Finance figures on public expenditure in 2008, source: The Law on State Budget 2009. Available form: [www.mof.ge](http://www.mof.ge) (accessed 17. 3. 2014)

increase, from GEL 83 million in 2007 to GEL 150 million in 2011 that is about 0.7 percent of GDP (World Bank 2012).

In January 2010, 420.800 people (9.6 percent of the population) were receiving cash transfers<sup>6</sup>. According to the World Bank report 2009, without the TSA, the group that received the benefit would have had a poverty rate of 71 percent compared with 50 percent currently (World Bank 2009). According to World Bank's later report (2012) the poverty headcount without TSA is almost two percentage points higher than the headcount with TSA (27.5 versus 25.7). The difference in the poverty gap is slightly greater than two percentage points (9.6 versus 7.5). If TSA were removed, poverty rates would rise for everyone, especially for children. Without TSA, *extreme* child poverty would rise by more than 65 percent (UNICEF 2012). In 2011 the TSA budget was about 0.7 percent of GDP, covering about 10 percent of the population - 430,000 recipients out of a total 1.7 million individuals registered in the database (World Bank 2012).

Though by most benchmarks the programme has succeeded in terms of targeting disadvantaged groups, in the official presentation of the results of the TSA programme in 2010 June<sup>7</sup>, main weaknesses of the program was considered to be a) the low amount of the assistance, as not being enough for the beneficiary to get out of the extreme poverty, b) the majority of extreme poor did not refer for the assistance as population is not informed about the assessment system. There were several renewals of the program. New measures include an increase of the size of the benefit, consideration of the size of households to calculate the proxy means score, greater role for communities in reviewing eligibility, and the exclusion of certain assets from the proxy-means testing formula. The important improvement was also cut of the waiting times between application and receipt of benefits, from six to three months. Also, since 2010, the government started to review the eligibility status of TSA beneficiaries by cross-checking responses to SSA interviewers with the data of other government agencies related to income tax, property, and vehicle registration. This has helped to identify an inclusion errors and improve targeting effectiveness (World Bank 2012).

Despite the achievements, there are still some issues to be worked out regarding the programme's methodology, coverage and targeting. For example, the level of the benefit is not differentiated according to different extents of poverty and indexation for the changes in cost of living is not considered (World Bank 2012). Overall TSA is recognized as a successful program, though with a deficiency of "self-adjusting" programs such as public works or unemployment insurance as the main "automatic stabilizers". Relying on the TSA program requires committing additional fiscal resources that cannot be easily scaled back once economic growth resumes.

Another issue for scrutiny is the impact of a social assistance program on the incentives for labour market participation. Despite the fact that opinion polls do not provide much

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6. Social Subsidies Agency (2010): Data on recipients of targeted social assistance. Available from: <http://ssa.gov.ge/index.php?id=32&lang=1> (accessed 20. 1. 2010)

7. Meeting with local NGOs and local government representatives launched by Georgian Association of Social Workers in June 2010 in Tabakhmela where Head of SSA was presenter.

support for the idea of creation of a culture of dependency, a comparison of labour market participation by TSA recipients and non-recipients who do receive medical insurance for the poor (i.e., those with a score between 57,001 and 70,000<sup>8</sup>) did not detect any significant difference, the more formal data indicates that there is little evidence that Georgia's TSA is in fact discouraging labour force participation. World Bank (2011) report states that labour market participation rates are quite high in Georgia, however lower for women compared to neighboring countries and caregivers for terminally ill. The study also reveals that that pension receipt – especially by women – may reduce the pressure on younger household members to find work. Therefore it is obvious that policy measures needs to revisit *from welfare to work* schemes to stimulate TSA beneficiaries participation in the labour market and promote better job prospects for program beneficiaries. Several studies found that the majority of beneficiaries receiving state allowances were eager to work; problems associated with the benefits system did discourage people from looking for work; and such demotivation did not lead to a dependency culture – people considered state support as their last resort (Alcock 2006). Therefore we cannot conclude that TSA improved social functioning of its recipients. However, recently established Employment Department within the Social Service Agency under the Ministry of Labour, Health and Social Affairs provides reasons for optimism as it aims at “promotion” aspect (Barrientos 2010) of well-performing social safety nets to link the TSA beneficiaries with job openings and training possibilities. Targeted social assistance has an important impact on households that receive it but the benefit only reaches 17 percent of those defined officially as poor. Over a third of officially poor households receive no social assistance of any kind (UNICEF 2010). Its potential to enable targeted poor meet their needs is under question. Within the World Bank study (2012) consumption quintiles of individuals who receive TSA were compared to post - TSA consumption quintiles and appeared that, 63 percent of households who were in the lowest consumption quintile without TSA stay in that quintile after the benefit (World Bank 2012). It is inevitable that without the differentiation of the level of benefit it could be impossible to lift those in the bottom out of poverty.

#### **4. The most vulnerable groups affected with poverty**

The impact of the benefit varies across the groups of population maintaining female headed households, children and people in remote areas more vulnerable to poverty. Besides the World Bank study (2012) figured out the level of accessibility to social entitlement in Georgia. The study revealed that substantial amount of poor households has difficulties accessing their entitlement. Among these households families from Tbilisi and ethnic minorities prevailed (the detail discussion on barriers to services see below).

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8. Social benefit system introduced several thresholds identifying the eligibility for the assistance, e.i. household receiving below the 57 001 score were eligible for cash assistance (60 GEL for first and 48 for each following family member) and medical insurance, those under 70 000 were eligible for health policy only.

Female headed households face a higher risk of extreme poverty than total poverty: 11.3 percent compared to 8.6 percent among male-headed households. In terms of the total poverty the incidence of poverty among female-headed households merely overcomes that of male-headed households (25 percent and 23 percent respectively) (World Bank 2009).

Since the operation of TSA programme children were and remain at the highest risk of poverty. Poverty among children was found to be significantly higher than the national average. The poor households comprise of 28 percent of children. These households include 12.7 percent of the population, 13 percent of all children and 17.7 percent of all pensioners (UNICEF 2010). The consumption-based total poverty rate among children was 28 percent rather than 23.7 percent of the general population, and the extreme poverty rate was 12 percent among children rather than 9 percent of the general population (UNICEF 2011).

Though the situation has changed since 2009 in terms of poverty, as poverty rates decreased from 2009 to 2011 and the number of households below the relative poverty threshold (109.2 GEL) fell by 2 percentage points from 24 percent to 22 percent. Although the percentage of children living in households below relative poverty fell even more, by three percentage points and the percentage of children living in extremely poor households in the period 2009-2011 declined more than the percentage of other groups in poverty, still 9.4 percent of children lived in extremely poor households in 2011. So do 8.3 percent of households and over 9 percent of the population (UNICEF 2012).

As UNICEF *Reducing Child Poverty Discussion Paper (2012)* states, poverty rates rise significantly in those households with more children. For the relative poverty threshold, 24 percent of households with one or two children lived in poverty and this figure increases considerably up to 30 percent for households with three or more children. Despite the positive trends in poverty reduction and the considerable drop in child poverty, the percentage of children living in poor households remains higher for every threshold than the poverty headcount for the whole population (2012).

Though pensions and TSA proved to be an effective measure for poverty reduction the need to scale up impact of the programmes was obvious. Therefore the government increased pensions from 2012. The government also introduced basic health insurance for all, pensioners among them. According to UNICEF (2012) estimations this raise in pensions will supposedly impact poverty alleviation. According to World Bank study (2012) the poverty rate (prior to most recent increase) was lowered by over 15 percentage points due to pensions. Though TSA has a more powerful potential impact upon reducing child poverty than pensions, cash benefits under TSA are means tested whilst old-age pensions are flat, universal monetary payments. However, the likelihood of a child benefiting from state provided pensions depends largely upon whether or not the child lived in multi-generational family i.e. pensioner lives in the household. The receipt of TSA depends upon state's decision that an applicant household qualifies for the TSA benefit. Though this decision follows the self-referral of the applicant. As mentioned above one of the weakness of the program was considered to be the lack of information among disadvantaged groups about the assessment system.

In 2011, coverage by Targeted Social Assistance (TSA) cash benefits which provides support to the most vulnerable families in Georgia increased in the poorest 20 percent of households. This improvement was due to the refinement of the TSA formula in 2010 along with the introduction of new administrative arrangements for maintaining the TSA database. When comparing TSA coverage by households with and without children, however, it is evident that in the poorest households, those with children were less likely to be receiving cash benefits in 2011. 12 percent of households with children were receiving TSA in 2011 compared to 15 percent of households without children (UNICEF 2012). In 2009, 35 percent of households without children in the poorest wealth group were covered by TSA cash benefits as compared to 56 percent of similar households covered in 2011. As for households with children in the same consumption group, the increase was from 43 percent to 53 percent in the same time period. Even though coverage of TSA cash benefits increased, this positive change is more evident for households without children (UNICEF 2012). TSA accessibility starts with self-referral procedure. Accordingly the receipt depends on the decision of the household head and thereafter the decision of the state identifying whether the household qualifies for the assistance or not. In Georgia social workers of child care system are not conducting outreach service, accordingly the identification of the child's needs depends much on the awareness about those needs and the their rights to social protection by their parents. Assumedly, child's right to decent social life is not well advocated in the most of the cases.

**Table1: TSA coverage of families with and without children**

Coverage of families without children			
2009	2011	2009	2011
35%	56%	43%	53%

There are no child specific social benefits in the country aside from the reintegration allowance for children living in institutional care. However currently pre-school education is free though it was not until 2013. Therefore pre-school enrolment among children was low. In the immediate post-Soviet period, the Net Enrolment Ratio (NER) in Kindergartens fell from an already low figure of 45 percent to 23 percent amongst 3-5 year olds and the number of kindergartens was halved. According to the Reproductive Health Survey (RHS) of 2011, the number has increased to 41.2 percent in recent years. However, this increase comes with significant disparity of 31.1 percent of rural children against 51.5 percent of urban children and 25.8 percent of children from the poorest quintile compared to 53.5 percent of children from the wealthiest quintile attending pre-school.

A review of research carried out on both the availability of services and parental attitudes between 2005 and 2007 revealed two consistent causal factors in low pre-school NER. The first was the inability of parents to pay the fees for kindergarten enrolment. The pre-school education is the best investments with the highest economic returns to society resulting in reduced dependency on state social services (World Bank 2011). As

World Bank (2011) study suggests social spending needs to increase in early childhood development programs for promotion equality of opportunity. It underlines the experiences of the countries that have successfully instituted early childhood development as a foundation for their human development strategies having the highest return rates. It is also increasing the chances for evaporation of the social problem of poverty and inequity by separating them from life threatening risk factors (Dragoš and Leskošek 2003).

Despite the ongoing child welfare reform and government focus on the most vulnerable children household poverty is a major contributor to family separation. Besides the main purpose for institutionalization of children is poverty and family malfunction often as a result of resource deprivation (UNICEF 2012; SOS CVG 2013).

Therefore UNICEF recommended the government to enrich the social benefits for households with children proposing several interventions:

- 1) Increase of the TSA cash benefit by 50 percent.
- 2) Increase of the TSA cash benefit by 100 percent.
- 3) Increase of the number of beneficiaries by increasing cut-off score for TSA cash benefits up to 100,000 points (currently it is 57001).
- 4) Introduction of Universal Child Benefits per child aged 0-16 years.

The analysis of the various models has shown that universal child benefits together with increased pensions are the most effective social protection tools for reducing child poverty as well as poverty of other groups (UNICEF 2012), though the government started to implement the second version. The expectation is that this increase together with the pension increase would reduce *extreme* child poverty from 9.4 percent to 6 percent and *relative* child poverty from 25 percent to 18 percent. However if the previously mentioned most effective model was selected (pension increase in supplement with the child benefit) it would reduce *extreme* child poverty from 9.4 percent to 3.9 percent and *relative* child poverty from 25 percent to 15 percent. In this scenario, almost 60 percent of children are estimated to be lifted from *extreme* poverty.

**Table 2: Scenarios to enrich social benefit for householders with children recommended by UNICEF**

Original Extreme Poverty rate being 9.4% and Relative Poverty rate 25%	Scenario 1: Increase of the TSA cash benefit by 50%	Scenario 2: Increase of the TSA cash benefit by 100%	Scenario 3: Increase of the N of beneficiaries by increasing cut-off score for TSA up to 100, 000 points	Scenario 4: Introduction of Universal Benefit per child aged 0-16 years
Estimated Extreme Poverty	6.6%	6%	5.9%	3.9%
Estimated Relative Poverty	21%	18%	19%	15%



Besides the effect would stretch over all other groups. It will decrease poverty in all households from 8.3 percent to 4.5 percent and decrease poverty in the general population from 9.1 percent to 4.5 percent. Moreover it will decrease pensioner poverty from 8.1 percent to 2 percent as well (UNICEF 2012).

## 5. Service Accessibility

The World Bank (2011) study attempted to figure out the level of accessibility to social entitlement in Georgia. The study revealed that substantial amount of poor households has difficulties accessing their entitlement. Households in the west Georgia are more likely to receive assistance than households in the east part of the country. The proportion of households receiving TSA is the lowest among the Azeri and Armenian households. The former live in the east part of the country and the latter in the southern part of the country. Among barriers for application, a small group of people named documentation, language, distance, absence of permanent residence. The majority of non-applicants do not know how to apply for the database (76 percent) or are misinformed (10 percent). 14 percent of those attempted to obtain birth certificate or personal ID failed due to the inability to pay the fees needed for the documentation.

Only 4 percent of respondent families encountered a problem with accessing pension benefits due to the vagueness concerning documents for application for the benefit and problems reaching the Social Services Agency (SSA) due to distance.

Among those 53 percent of the families who reported that they have health insurance, majority are insured under the Medical Assistance Program for Poor (MAP insurance) or other governmental health insurance programs. Among insured majority are families in west Georgia. The main reason for not having insurance is 'not qualifying for the 'MAP', 'lack of money to purchase a private insurance policy' or lack of information on where and to whom to apply to get insured by state/municipal programs (World Bank, 2011). Three-fourths of those insured reported that they would not have been able to cover the cost of the treatment without insurance. Those not using the benefit as a reason for it named 'health services used are not covered by policy', 'limited knowledge of how to use the insurance' or an absence of health problem (World Bank 2011).

Georgia spent about 1.9 percent of GDP on health at the general government level in 2011, of which about the half of the health related state funds in 2011 was spent on publicly funded health insurance programs and another half on a disease-specific programs. Medical Insurance Program (MIP) for the poor targets the poorest 20 percent of the population (about 900,000 individuals) with the budget of GEL 136 m, based on the same proxy means test that is used for the Targeted Social Assistance (TSA) program. MIP has a significant impact on reducing out of pocket expenditures for health care. MIP beneficiaries pay approximately 50 percent less than non-beneficiaries achieving one of its program goals to reduce poverty (World Bank 2012).

## 6. Conclusion

It is interesting to what extent does TSA enable the targeted poor to improve their quality of life. As the available findings suggest the material situation of the recipients has changed to better and it had preventive impact, however there are still structural barriers to labor market. Even for the short term employment opportunities the benefit recipient jeopardizes the loss of benefit and the insecurity for the period of joblessness and benefit restoration intensifies the reluctance for job search. Poverty and its devastation cannot be solved by providing the poor with only targeted cash assistance. Assistance program in Georgia is sufficient to deal with poverty, however does it deal with vulnerability? We have to treat poverty and social exclusion as denoting different aspects of the same social phenomena. The latter being a process of detachment from the labour market, social communities and organizations; the former is the lack of an adequate income. The latter is about participation, whereas the former is about distribution (Fitzpatrick 2001). According to Sen (Sen 1999 in Barrientos 2010) appropriate space to assess poverty is “capacity to achieve rational life plan”. Poverty measure used in Georgia takes into account basic physical needs rather than social needs, providing therefore, a very ‘meagre view of poverty’ with supposition that considerably fewer people are poor in Georgia today. Yet absolute definitions of poverty are ‘attractive’ (Cunningham and Cunningham 2008) to politicians who want to underestimate levels of poverty. If we adopt a relative definition, that Peter Townsend defines as “resources are so seriously below those commanded by the average individual or family that they are, in effect, excluded from ordinary living patterns, customs and activities” (Townsend 1993), considerably more people are poor in Georgia currently. In order to determine who is ‘excluded from ordinary living patterns, customs and activities’ ‘consensual’ relative definitions of poverty seek to overcome such difficulties by inquiring about to establish what ‘most’ people think is an acceptable standard of living, and then assessing the numbers of people living below that standard (Cunningham and Cunningham 2008). This was not conducted in Georgia.

The delivered social protection services did not demonstrate the positive changes of the beneficiaries in terms of their social life and status; with few exceptions of the cases at the micro level, where the success of the social workers involvement revealed its importance<sup>9</sup>. Level of people’s awareness about the profession is not high. World Bank (2011) study revealed that one in ten of the respondents had heard of social workers (9 percent). However the majority of them are unclear about the role of social workers and the kind of services a social worker provides (62 percent) and do not know where to apply in case they need a social worker’s support (53 percent). On the policy level the involvement of the social workers in neither of the social services was considered. Through this view, poverty is invented within the systemic constraints resulted in lessened life chances and accessibility to resources and services and low level of participation (Gans 1995; Gil 1998).

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Glory Mmasetjana Lekganyane

## **SERVICES AND PROGRAMMES FOR TEENAGE PREGNANCY AND SUPPORT FOR TEENAGE MOTHERS: RURAL AREAS OF LIMPOPO PROVINCE OF SOUTH AFRICA, AND SLOVENIA<sup>1</sup>**

*ABSTRACT: This article seeks to juxtapose the current services and programmes that deal with the prevention of teenage pregnancies and the teenage motherhood notion in South Africa and Slovenia. The paper looks at the situation in both countries and tries to detect the main problems in the two cases and therefore proposes changes on the basis of what is known about the two countries. In other words, we describe the situation, identify problems and suggest solutions. Teenage pregnancy and teenage motherhood are always viewed as inseparable and as a discourse that exists due to a variety of social and sociological variables. The notion of teenage pregnancy and teenage motherhood is assessed against related theories and scholastic (secondary) evidence. Finally, it is argued that intervention services and programmes that are linked with the life perspective of teenagers and teenage mothers yield positive results.*

*KEY WORDS: teenage pregnancy, teenage mothers, intervention services, prevention, programmes*

### **Storitve in programi za najstniške nosečnosti in najstniške matere: ruralna območja južnoafriške province Limpopo in Slovenija**

*POVZETEK: V članku primerjamo službe in programe, ki se ukvarjajo s preprečevanjem najstniških nosečnosti ter najstniškim materinstvom v Južni Afriki in Sloveniji. Raziskali smo stanje v obeh državah ter poskusili identificirati pglavitne težave in rešitve. Najstniško nosečnost in najstniško materinstvo običajno obravnavamo kot neločljivi kategoriji ter kot diskurz, ki obstaja zaradi različnih socialnih in socioloških spremenljivk. Pojem najstniške nosečnosti in materinstva ocenjujemo glede na sorodne teorije in glede na znanstvene*

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1. I pay tribute to my rock, Professor Tanja Rener in offering guidance throughout my journey in writing this article.

*(sekundarne) dokaze. V članku trdimo, da intervencijske službe in programi, ki upoštevajo življenjske perspektive najstnic in najstniških mater, prinašajo pozitivne rezultate.*

*KLJUČNE BESEDE: najstniška nosečnost, najstniške matere, posredovanje služb, preventiva, programi*

## 1. Introduction

"Effective strategies of prevention of teenage pregnancies and parenthood need to include sexual education, contraceptive access programmes and alternatives to pregnancy and parenthood, with a focus on education, vocational training, academic tutoring and support, career counselling, employment and involvement in community" (Slowinski 2001:3).

Practitioners and professionals need to be scientifically and theoretically informed, to have a critical indepth construction reflection about what influence their practice when they deal with the notion of teenage pregnancy and teenage motherhood (Eraut 1995). The future of the people is usually determined by the way they construct themselves (Urek 2006). Stories of teenage mothers in this regard may have an effect in shaping their future. These stories are interpreted and constructed meaningfully by professionals in order to develop effective strategies that will be utilized to prevent teenage pregnancy and support for teenage mothers. The same argument is applicable to Habermas's theory of communicative action where life world and the system world approaches are stressed in order to show how they might be completely different. The argument also shows how frequently the system world colonizes the life world of ordinary people. Arguing from inductive and deductive point of reasoning, more pregnant teenagers and teenage mothers are in a crisis situation which contribute to social exclusion in society. Failure to receive proper information puts pregnant teenagers and teenage mothers in a crisis situation, which contributes to their social exclusion. These teenagers are a vulnerable group that needs support as they are often forced to leave school due to child rearing issues.

Research in this area has shown that teenage pregnancy and teenage motherhood are multidimensional and complex phenomena which require interactions among the individual, the family, the society as well as the system context. The family system is regarded as a significant aspect and an indispensable resource in the primary prevention of teenage pregnancy and subsequent adjustment (Benson 2004; Casper 1990; East et al.2006; Olson et al. 1984; Quinlivan et al. 2003) and preferably focusing on promotion of more adjustment on the developmental trajectories of teenagers who fall pregnant and choose for motherhood (Shanok and Miller 2007). These findings are in line with recent general health findings that suggest a need for intervention approaches that are multilevel to elicit behavioral changes (Glanz et al. 2002). That said this may ultimately lead to a need for interventions that are psychosocial and specifically tailored to prevent teenage pregnancy, and also support its after effects in the case of those who carry the pregnancy to term as well as addressing different life context, rather than focussing only on the individual (Quinlivan et al. 2003). According to feminists view (Reproductive Health and HIV Research Unit 2003, Jewkes et al. 2001) inequities

in terms of gender power contributes to women's vulnerability in early unprotected sex and teenage pregnancy. Teenage mothers are portrayed as irresponsible, by media stories, advocacy organizations, and professional discourse (Lewis et al. 2007). Some studies regarded family counselling or therapy as very important when dealing with multifaceted problematic families such as those linked with teenage pregnancy (Micucci 1998), although there is a dearth of scholarship pertaining to therapy and family counselling especially in the area of support for these pregnant teenagers and teenage mothers. Social workers or other professionals may be encouraged to create conducive environments that enhance growth, social and health functioning, as well as capacitating these teenagers to develop resources that will assist them to cope with stressful situations (Nash et al. 2005: 34).

The behaviour of family members and the individual are significantly interdependent, so a focus in the whole family system may increase the impact of intervention (Chermis and Herzog 1996). However, this paper seeks to present a holistic view of intervention services and programmes that deal with prevention of teenage pregnancy and teenage motherhood support in rural areas.

The investigation assessment here will encapsulate a multidisciplinary mode based on relevant theories and secondary scientific evidence on intervention services of teenage pregnancies and support services for teenage mothers. The research method is based on scrutiny of theoretical and scientific texts. In other words, this paper will evaluate the current situation in South Africa and Slovenia through theoretical and secondary scientific evidence.

## **2. Intervention services in rural areas of South Africa**

South Africa is having a lower rate of teenage pregnancies as compared to the general rate in sub Saharan Africa (Makiwane and Udjo 2006). The country has a general population of 51,77 million people ([www.statssa.gov.za/census](http://www.statssa.gov.za/census) 2011). South Africa is on the same level with many middle income countries but higher than many European countries. When we look at South African situation from a social work point of view and sociological perspective, the country has a prevailing situation of teenage motherhood that in most instance occur outside marriage as compared to other sub Saharan countries (Makiwane and Udjo 2006).

The current South African plans and policy identify reproductive and sexual health as main priority issues for intervention based on health. Prevention of teenage pregnancies and support provision to pregnant teenagers and teenage mothers contribute the main aim of increasing reproductive health (Macleod and Tracey 2001). This pose a challenge for policy makers to revise their strategic plans in line with the intersectionality of gender, values, norms and beliefs as well as engagement of the client perspective of these teenagers.

The Department of Education Health's policy guidelines for youth and adolescent health strategies for interventions embrace the following issues: promotion of a supportive and safe environment; providing transformation on the health system; provision

of counselling; developing of skills to have options for life and availability of health services.

Provision of services and education are key variables in accomplishing these intervention strategies. Implementation of these reproductive health services is hampered by staff turn over, insufficient time to deal or counsell young teenagers on contraceptives. According to Mqhayi et al. (2004) 17% of young women who were interviewed at rural and urban health clinics indicated that they had heard about emergency contraception. More women from urban areas knew about emergency contraception as compared to rurally-based women (Smith et al. 2001).

Studies on contraception also found that teenagers' knowledge varies, with misassumptions abounding (Ritcher and Mlambo 2005; Oni et al. 2005). For example, Rutenberg et al's (2001) survey indicates that only a few participants (8%) had knowledge about menstrual cycles and the period when a woman is at risk of becoming pregnant. Research on the dynamics of young people's education on sexuality and contraception in these communities found that young people's sexual relationships include poor communication, unequal decision-making, inadequate knowledge concerning reproductive health, sexual issues, the legality of abortion and the cost of abortion. Limited education presented on sexuality and peer pressure were significant factors on the decisions young people make in relation to sexual behaviour and reproductive health (Arai 2003; Bankole et al. 2007; Leclerc-Madlala 2002; Varga and Makubalo 1996; Varga 1998, 2003; Vundule et al. 1998; Wood and Jewkes 1997).

That said, this leaves us with a question mark about the quality of the current intervention services and programmes as whether are they designed in line with the life world of these teenagers. Furthermore, a lot of scholarship does not indicate whether the service providers, trainers and counsellors that deal with reproductive health services have received quality trainings that will benefit these teenagers and teenage mothers in terms of their different cultural and socio-economic backgrounds. In other words, even if these trainers are well equipped with a valuable information, such information may be unproductive for these teenagers as long as it does not incorporate their cultural existence. In addition Macleod (1999b) discovered a serious gap between reproductive ignorance and adolescent pregnancy that is not fully addressed by a number of scholars which deal with the reproductive ignorance hypothesis. His argument is also based on the fact that lack of sexual knowledge cannot be regarded as a valid reason for conception as there are various issues that are interrelated and further contributing for teenage pregnancy and its after effects.

The main element of health care services include large distribution and development of educational material that cover key issues such as emergency contraception, information on contraception, pregnancy signs, the importance of early presentation, young people's rights pertaining termination of pregnancy act, early access to contraception, termination of pregnancy's benefits for early presentation, the solution of teenage pregnancy based on nonjudgemental counselling, assisting those who opt for adoption after delivery and those who keep the baby to access appropriate services such as child support grant where necessary. Community health nurses provide sensitive, accurate



information on prenatal and post natal care for the child and mother and also provide counselling for young women to return to school. A national sample study reflects 86% of adolescent mothers who regarded nurses as playing a positive role at a family clinic. In addition the majority of these teenage mothers indicated that they had waited only 30 minutes to receive help at a family clinic (Ehlers 2003). Teenagers do not want to wait for long hours to receive contraceptive services. The long waiting system might be seen as a stumbling block to access contraceptives by some teenagers as reported by Jones in Limpopo Department of Social Development (2011).

Intervention services in other Provinces of South Africa yields positive results on the life world of these teenagers, although lack of staff members tend to hamper progress especially in rural areas where resources are still scarce as compared to urban areas. Researchers suggest that scientific knowledge and empirical evidence are not regarded by policy makers, advocacy groups and professionals for a variety of reasons (Duncan et al. 2010; Furstenberg 2007). Teenage mothers are often stigmatized as being poor, too young, single and draining public welfare (Breheny and Stephens 2010; Cassata and Dallas 2005).

Generally, the child support grant (CSG) is improving nutrition and child health and has a positive impact in increasing teenagers' school attendance. CSG is regarded as the biggest social cash transfer system and the government's most successful protective intervention programme in South Africa, in terms of reaching out to a large numbers of participants including teenage mothers (Department of Social Development 2008). It also enables these teenagers to prepare their children for school readiness as well as helping with uniforms and school funds (Case et al. 2005), although other studies perceived the CSG as leading "perverse incentive" to conceive (Planned Parenthood Association of South Africa 2003).

Based on these views, one would argue that the CSG is very important to protect the lives of both the teenager and the child, although the teenage father is often left out in the picture in terms of showing responsibility even when he could afford to contribute financial and socially. In other words, certain cultural backgrounds are still giving teenage fathers the latitude of not taking responsibility in the upbringing of their children. Teenage mothers are seen as being oppressed as they always carry the burden of child rearing financially, socially and emotionally as compared to teenage fathers who in the most instances are gender-favoured. In the end, many children of these teenage mothers are raised without a father figure, a situation that could expose them to risk factors. So, it is best if teenage fathers are taught responsibility in the upbringing of their children. Therefore, environmental factors that influence behaviours and accessibility to structural support such as access to resources, standardized schools, poverty alleviation and community development should be considered together with the gender issue, in line with the teenager's life world.

Termination of pregnancy is taking place in South Africa, although statistics reflect a minority group of young women who opt for such a practice. This low level of termination of pregnancy is associated with the stigma of abortion (Buchmann et al. 2002; Pettifar et al. 2005). In other words, abortion is still not accepted in most cultures

even though it has been legalised and such practices are having an influence on some pregnant teenagers not to commit abortion.

### 3. School Clinic Based Approaches

Lot of clinics in rural areas of Limpopo province are integrated, applying a supermarket approach. The province has an average population of 5.404.868 ([www.citypopulation.de/php/South Africa-limpopo](http://www.citypopulation.de/php/South-Africa-limpopo)). Health care providers, especially nurses are rendering services to clients on daily basis. Some clinics are still having insufficient humanpower in terms of health care workers and this contribute for clients to wait before they could receive help (Limpopo Department of Social Development 2011). Most of these programmes are operating mainly in Kwa Zulu-Natal. Evaluation of such programmes indicates that learners that are exposed to DramAide programmes had sufficient knowledge and attitudes towards HIV and had increased condom usage as compared to programmes that have information only (Macleod and Tracey 2009). Based on this , we will argue that extension of such programmes to areas that are still disadvantaged in Limpopo Province may bear positive prospects to teenagers. There is still a dearth of scientific evidence on the exploration and evaluation of intervention services and programmes for teenage pregnancies and support for teenage mothers in deep rural areas of South Africa. The more such services and programmes are identified and evaluated scientifically, the more services will be in line with the life world of teenagers and teenage mothers.

While relevant sections are rendering services to teenagers and teenage mothers, researchers indicate that emergency contraception knowledge is poor in general (Mqhayi et al. 2004). Intervention strategies that are currently in place should be perused in terms of the life world of these teenagers and teenage mothers. In other words, a more holistic assessment should be done on these teenagers and teenage mothers to have a deeper understanding of who they are, how they survive, what are their challenges and how they think respective service providers should intervene to promote a future healthy life style. Such intervention strategies should be informed by social and sociological variables such as socio-economic and health related factors as well as the influence of culture in general and local characteristics in particular. Based on this it looks like there is a need for adults and elderly people to receive a thorough training on how to equip these teenagers with life skills. Such training may yield positive results on the client perspective of these teenagers if they are facilitated in collaboration with relevant affected departmental sections and non-governmental sections.

The intervention strategies disclose a gap in the lifeworld of these teenagers and the manner in which the system world is dealing with the notion of teenage pregnancy and support for teenage mothers. A look at the South African perspective especially in rural areas provides a clear picture of exclusion in certain rural areas regarding the mode of service delivery as validated by approximately 11% of service providers who reported that insufficient information on reproductive health and sexual issues lead to teenage pregnancy (Limpopo Provincial Government 2011). Such situations warrant

review of policies that impact teenage life and culture in order to deal with the past and present situation of these teenagers.

A number of intervention programmes have been institutionalized in South Africa in keeping with many influential spheres on adolescent sexual behavior. These include adolescent peer education programmes, life skills education programmes, school based sex education, mass media campaigns, adolescent friendly clinic initiatives as well as community programmes. A lot of interventions are also executed by non governmental organisations<sup>2</sup> that are not affiliates of governmental departments. For instance, the Soul City is an awareness campaign programme that deals with health generally through a multi-media system. It reaches an estimated 12 million South Africans through health booklets, publicity awareness campaign, radio drama played on daily basis, a slot time programme on television as well as youth life skills programmes and adult education. Although the focus of these interventions has basically been dealing with the prevention of HIV, they also benefit teenagers on the issue of teenage pregnancy due to the programme's impact on sexual behavior (Department of Basic Education ([www.education.gov.za](http://www.education.gov.za); Macleod 1999).

The quality of these programme interventions is governed by the scale, range, accessibility, the manner of operation and had also some limitation on the impact of adolescent sexuality.

It is useless to empower women in sexuality issues, without involving men about gender relations that are equitable. Marginalisation of most young people across the country provide a platform for a focus on a systematic intervention that will address care, treatment and support (update report on teen pregnancy prevention [www.beststart.org/resources/rep-health/pdf/teen-pregnancy.pdf](http://www.beststart.org/resources/rep-health/pdf/teen-pregnancy.pdf)).

#### **4. South African Health System**

The South African Health system is good but it is very protective for the people who are insured. Those who are not insured are less likely to receive regular care from private doctors and are more likely to receive care from doctors, a midwife, and a nurse in a hospital setting due to lack of money and unemployment issues. Although teenagers receive services, some of them are not fully equipped with information regarding the signs of pregnancy complications, measurement for height, blood pressure and weight, taking of blood and urine samples or to receive iron supplements. Most of young women usually do antenatal tests very late in their third and second trimester.

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2. Young Men's Christian Association is responsible for running a peer education programme. The programmes address sexual health issues among teenagers in general, and also focus specifically on HIV. Its target group are girls and young women aged 13-19 years through trained "HIV activists" peer educators. The Old Mutual is running a programme called 'I have Hope AIDS Peer Group Project'. The programme's focus is to implement peer education groups in secondary schools, especially youth at the age of 15 to 18 years. Teachers are also targeted. Teenagers are challenged to be aware of and to take responsibility in terms of preserving their reproductive and sexual behaviour.

South Africa has a general and continuous problem of late reporting for pregnancy care (Myer and Harrison 2003). Furthermore issues such as lack of knowledge pertaining to significance of antenatal consultations, male partner's denial on paternity, taboos that are related to adolescent sexual activity, may contribute for teenagers to do late consultations (Phafoli et al. 2007). Based on this information, professionals and service providers are still having a challenge of dealing with different cultural, historical situations that may need thorough training on service providers and professionals to accept the current situations of teenagers and teenage mothers and also to be able to transform such situations in order to benefit the life perspective of these teenagers and teenage mothers.

## 5. Slovenia

Abortions and adolescent birth rates in Europe are key variables in indicating which family oriented planning programmes should be designed in order to meet the needs of people. Furthermore these also articulate the issue of unmet needs in term of adolescent contraception. Strategies to improve the use of effective contraceptive forms consist of comprehensive sexuality education programmes in local schools, communities, promoting open discussions on sexuality issues such as educational campaigns, mass media, but also safe abortion legislation, equal and easy accessibility contraception, youth friendly services and education (Albreht et al. 2006).

In this respect, the World Health Organization (WHO 2005:1) states that:

" Children are our investment in tomorrow's society. Their health and the way in which we nurture them through adolescence into adulthood will affect the prosperity and stability of countries in the European region over the coming decades".

The quotation clearly denotes the fact that healthy lifestyle from prenatal life to adolescence serve as a resource for good economic and social development.

The Slovenian's health reform in 1992, structured the following five main goals:

- Co-payment for several health care services
- Emergence of social health insurance
- Introduction of health care private practice
- Handling over governmental responsibility for planning and central functions to municipalities and professional associations and introducing licence and recertification for health professionals (Albreht and Klazinga 2009).

Research indicates that it is the responsibility of Slovenian citizens and its inhabitants, employers and the state to contribute actively to incur the health care costs through a Care Health Insurance scheme based on social health insurance principles. The health insurance and health care system is a public, non profit service which is compulsory legislatively and covers the whole population. Programmes of health service at all levels are determined through negotiation processes among partners that are equally represented (Leskošek 2012). Based on this information, it is clear that the availability of health insurance and health care system is very significant in promoting a healthy life style among the teenagers and the population at large.

## 6. Gender impacts on adolescents' health with focus on safe motherhood and safe abortion

The health of teenagers and sexual activity is led by the adolescent's environmental socio-economic status, cultural, religious beliefs, accessibility to education, gender as well as ethnic background. Gender perspective plays a crucial role in shaping adolescent's view on sexuality and in turn affects sexual behaviour, accessibility on information and services, attitudes on risk taking and their use. Reproductive health needs as well as reproductive health status are also influenced by the gender perspective (Joshi 2005; WHO 2007).

The usage of teenage contraception and its prevalence differs across the European region. Adolescent pregnancy has declined over the past 20 years in the European Region. The reduction of these teenage pregnancies is associated with a combination of variables such as increase on the importance of higher educational levels, accessibility of contraception, knowledge improvement, freedom from the pressure of childbearing and early marriage and the sexuality education lessons introduced in school (Haldre et al. 2005; Singh and Darroch 2000). Slovenia is among the European countries that have moderate rates (40-69.9) of teenage pregnancy. Interestingly, more teenagers opted for termination of their pregnancy, rather than delivery in the Russian Federation, Sweden, Denmark, Finland, France, Estonia, Netherlands, Norway, Iceland and Slovenia (Avery and Lazdane 2008).

In a study conducted by Pinter and Tomori (2000) about sixty percent (60%) of students who were sexually active often used condoms and less often the pill (14%). Approximately one-fifth (19%) of the students had applied no method, and only a few used coitus interruptus (4%) or other methods (3%). Condom was regarded as the most important method of contraception. The research depicts a different rate on the usage of contraceptives among sexually active adolescents from other countries.<sup>3</sup> Slovenia was rated as amongst the highest in condom usage, which is even higher than Finland which has 50%. About 19% of teenagers in Slovenia were found to be not utilizing any contraception which is comparable to the rates in other European countries. Slovenia began to experience positive changes in teenage reproductive health in 1980s, resulting with significant pregnancy rate drop. According to the European Union Health Report (2011) Slovenia is in the middle with regard to the rate of teenage pregnancy that end up with abortion (the majority of adolescents opt for abortion and 43 percent choose to have a child) as compared to other European countries. The country has a general population statistics of 2.061.403 people ([www.stat.si/eng/](http://www.stat.si/eng/)). Statistics from 2010 show that abortion ratio among teenagers is about 7% of the amount of all abortions in that year. In addition regions like Pomurska and Podravska are seen as taking the lead with

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3. Marginalisation in relation to economic success, empowerment of young girls to take control of decision making with issues affecting their life world and accessibility of health care facilities. Denmark reflected 64% of teenage girls; Netherlands 56%; Belgium 61%; UK 43%, Germany 40%; Greece 40%, Hungary 35%; Finland 32%; France 17%; the percentage is very low in Italy (8%).

high abortion rates (Albreht and Klazinga 2009; Zdrastveni statistični letopis 2010). Poor accessibility of abortion services in some rural areas in Slovenia, regarding gynaecologists is mentioned as a serious problem in Antolič's study (2005), although the State has been the main provider of abortion services and a main co-ordinator of health sector in general (Seamark 2004). One of the regional service providers in Slovenia had indicated that some teenage abortion cases are officially not reported by family members as family members prefer not to disclose such incidences<sup>4</sup>. Based on this, it appears that current statistics on abortion may be misleading. Furthermore it may be difficult for teenagers to commit legal abortions especially in situations where patriarchy is still dominating in terms of the religion, socio cultural and historical background. This is a challenge for affected structures to come with intervention strategies that should be implemented to challenge some features of patriarchal societies in order to make services accessible through comprehensive information with regard to the prevention methods as well as support services.

Strategies for the improvement in using contraceptive forms that are effective include sexuality education programmes that are comprehensive<sup>5</sup> in local communities, schools, promotion of open discussions about sexuality in the mass media, education but also legislation that deals with equal access to contraceptives, education, safe abortion and youth friendly services (Pinter and Tomori 2000).

The popularity of condom usage and AIDS prevention programme may be regarded as the main contributory factors contributing to a decline in pregnancy rates. Even though half of reproductive health issues are attended pertaining to teenagers in Slovenia, it appears that there is still a need for a holistic strategic educational comprehensive services from a network of service providers to reduce the rate of these teenage pregnancies that end up with abortion (Sales et al. 2009). Research conducted in Slovenia on the consequences of teenage pregnancies revealed the following issues:

- Participants did not receive enough assistance pertaining to social and financial help; they experienced social and health complication problems during pregnancy-hood period; they had denial feelings as they could not figure out exactly how they became pregnant and still could not accept their status as teenage mothers (one of the participants never thought that she will fall pregnant because she had considered herself too young at the age of fifteen); the participants also revealed that although they had received information on sex education and sexuality education, it was not done on regular basis to enable them to understand various important issues that need to be taken into consideration in order to have options in life; they were disappointed as their partners had left them on their own and were very lonely as such; they had lost contact with their school mates; those that had married under

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4. Interview with Alenka Hafner, g.p (specialist in social medicine) working in the Institute for public health in Kranj (2 April 2013).

5. Comprehensive sexuality education: sex education that includes topics such as contraception, sexually transmitted diseases, HIV/AIDS and disease-prevention methods as well as the benefits of abstinence.

pressure of being teenage mothers could not last in their marriage as they later divorced each other (Mezeg 2013). Based on this, it appears that services that are currently in place are still not meeting the needs of these teenagers. Therefore it may be important for professionals and scholars to evaluate existing services and programmes in order to identify gaps that need to be filled.

- Research programmes (Šinkovec et al. 2010; Pinter and Grebenc 2010) conducted in Slovenia reflect a significant percentage of pupils who were sexually active with little information about protective measures and sexually transmitted infections at secondary schools (39% of pupils in second grade and 48% of pupils in final classes). Furthermore a significant percentage of adolescents did not use any protection at their first sexual intercourse as well as those who became pregnant (Rajgelj 2005). From this information it appears that the protective health measures that are currently in place need to be scientifically revised for efficiency reasons. In other words, there is a need to review intervention services that are comprehensive in order to reduce the rate of teenage pregnancies that end up with abortion. Furthermore the current services warrant a clear scrutiny based on the existing environmental variables such as socio-economic, religious, cultural background of these adolescents and how some of these variables could be dealt with in the transformation process.

Good practices and scientific evidence assist to identify programmes that are beneficial and effective, such as teenage contraceptive services and sexuality education in school (Kirby et al. 1994). Educational awareness campaigns on safe sexual behaviour appear to be operating, although sexuality education is not part of the school curriculum in Slovenia (Mezeg 2013). A survey conducted in medical high school indicated the majority of teachers who avoid topics that relate to sexuality and further that teachers are not putting a lot of efforts to educate the youth on sexual education (Giami et al. in Mezeg 2013). Approximately 60% of sexually active 15-year olds had applied a condom at last intercourse in Central, Western and Eastern Europe (Godeau et al. 2008). The results indicate improvement in the manner of utilizing contraceptives although the situation is not applicable to all the countries especially in rural areas where people still adhere to their beliefs, norms and values in terms of reproductive health.

Qualitative research indicates that young Slovenians plan their parenthood with hesitation and care because of issues such as unavailable housing, uncertain labour conditions, a need for a comfortable life, self realization and obtaining new gender balance (Manuela du Bois-Reymond 2008). The delaying of early parenthood is linked with low rates of teenage pregnancies, even though not all Slovenian teenagers appear to succeed in delaying parenthood due to some of the current intervention services that do not address in detail the impasse of teenage pregnancies and its implication as reflected in some studies (Mezeg 2013). It looks like the current school policies need to be revised and amended based on the experiences of these teenage mothers. Their socio economic cultural context in which they live has to be assessed too.

## 7. Accessibility of services

Primary reproductive health care is extremely important in Slovenia because of the active approach to protect reproductive health of women. The main goal of reproductive health prevention programmes which take place at the primary level are to lower the risk due to diseases that are related to reproduction, prevention of unwanted and unplanned pregnancies, detection of the disease, proper measures to be in place in terms of promotion of reproductive health and reproductive rights, primary reproductive health protection, ensuring counselling regarding contraception and promotion of family planning, curing sexually transmitted disease infection, healing, treating and uncovering diseases which could lead to infertility, curing and treating pregnant women, early detection of uterus and breast cancer as well as proceedings in peri-menopause and probably before and post menopause period. The primary health care is very important from an economic point of view as diseases are detected at their earliest signs and treated at their earliest stage and this affects lower medical treating costs. Despite the fact that by the data of Institution of Health Assurance (ZZZ), as well as the data of completed questions (phone poll) in all Slovene statistical regions, gynaecologists that are still obliged to take new patients are available. The accessibility of Primary Reproductive Health Care in the local environment is still bad in certain areas in Slovenia (Antolič 2005). This discourse is having a negative effect for the young girls who are coming for gynaecologists for the first time. In other words, they are not well oriented to the health system and as such they experience several stumbling blocks when they access medical health care. That said, there is a need for this young girls to have health care that is accessible and flexible in terms of proximity (availability of public transport) and time.

From this input it is clear that the current medical system is really benefitting most teenagers and teenage mothers as almost everybody is ensured and this practice promote the health standard of these teenagers, teenage mothers and their children. However, it also looks like that part of Slovenian teenagers are left out of the existing system of provision and support as far as the reproductive health is concerned.

## 8. Conclusion

Teenage pregnancy and teenage parenting are both challenging experiences for teenagers in both countries especially in South Africa. The article reveals the following issues in South Africa: inequities in terms of gender power that usually contribute for women vulnerability in teenage pregnancy and unprotected sex; lack of proper interventions in teenage pregnancy and psycho-social support for teenage mothers and furthermore does not incorporate intersectionality in terms of gender. In addition men and boys are often not taught the responsibility of helping women and these teenage mothers in terms of childrearing and finance. Professionals, service providers and nurses are playing a significant role in the life world of these teenagers although most of these current services and programmes are not strategised in line with the teenagers' life world, especially when we take into account their historic, social, economic and



cultural background. For instance, some of the teenagers are not having a comprehensive information in terms of emergency contraception, abortion and reproductive health in general. Some of the people in South Africa are living without an insurance, and such practices will pose a threat to their health. On the basis of these problems it is therefore suggested that current services and programmes should incorporate the clients' views, in the case of the teenagers. Policies should be designed in such a way that teenagers, pregnant teenagers, teenage mothers and women will be protected on the issue of inequity in gender power to avoid putting them at risk. Men and teenage boys should be workshopped inline with their culture on how to provide social and economic support to women, pregnant teenagers, as well as teenage mothers. Different service providers and professionals should work as a multidisciplinary team to strategise the implementation of effective services on reproductive health and the usage of contraception, in areas which are still disadvantaged in order to assist these teenagers to have alternative options for their future. The government should work together with the people to redesign an affordable health system which could be utilized by the people who have poor economic background, to promote a protective healthy life style.

Slovenia on the other hand is having moderate rates of teenage pregnancy, although more teenagers are opting for termination of pregnancy rather than carrying the pregnancy to term. Intervention strategies that are in place are very good although such interventions are still lacking behind in certain regions as teenage mothers still need help in terms of social and financial matters as well as denial feelings about their situation (Mezeg 2013). Although condom use is relatively widespread among teenagers in Slovenia, some research show that there are teenagers who do not use any contraceptive method at all. Such situations may put teenagers at risk in terms of infectious diseases and teenage pregnancy (Avery and Lazdane 2008).

Based on these issues, it is possible to make a number of suggestions. First, comprehensive services that incorporate teenagers' own views and experiences may be rolled out to areas that are still disadvantaged. Pregnant teenagers and teenage mothers who are having denial feelings about their situation can receive proper counselling from a network of social workers, gynaecologists, nurses as well as moral support from family members. Current policies can be redesigned and implemented in accordance with the historic, social, economic and cultural backgrounds of these teenagers. Services should also be gender sensitive in terms of promoting equity on the issue of gender power to avoid women vulnerability especially in rural areas. Teenagers may be informed on regular basis about prevention programmes in order to have alternative options for success and growth and to avoid risky situations such as teenage pregnancy and contracting infectious diseases. Policy makers, advocacy groups and professionals may utilize scientific evidence to evaluate the existing services and programmes in order to identify gaps that needs to be filled for improving the intervention practice. The relevant structures that are dealing with intervention strategies on teenage pregnancy and teenage matters can coordinate and collaborate efforts to design intervention strategies that are psychosocial to deal with teenagers problems as reflected in teenage mothers's views in Mezeg's study (2013).

Finally, both countries (Slovenia and South Africa) have intervention systems that are helping the teenagers although there are some gaps which needs to be filled in taking into account the holistic view of teenagers as well as their socio-economic and cultural background. Limpopo Province is big and therefore it may require additional humanpower for sectors that deal with teenage matters to render effective services and to avoid staff shortage. Coordination of services with NGOs and other sectors that are dealing with prevention of teenage pregnancy and support for teenage mothers will yield positive options for the future of teenagers. Slovenia on the other hand is a small country with a good health system that may still need professionals and service providers to restructure it in line with the perspectives of teenagers.

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Klemen Ploštajner

## **PO POTEH OBLASTI IN BOJA: KRITIKA DRŽAVE PREK LATINSKOAMERIŠKE IZKUŠNJE UPIRANJA**

*IZVLEČEK:* Namen prispevka je pokazati na težave, s katerimi se sooča boj za spremembo sveta preko boja za oblast. Izhajajoč iz teze, da so sredstva enaka cilju in da so v sam mehanizem zavzetja države vpisne specifične forme zatiranja, je potrebno kritiko obstoječih razmerij moči razširiti tudi na kritiko države. Prispevek želi pokazati, da vsi mehanizmi, ki moč in politično organiziranje trgajo iz skupnosti, v sebi nosijo kali lastne korupcije, odtujenosti in avtoritarnosti. Pri tej analizi se opiram predvsem na primere iz Latinske Amerike, kjer je napetost med gibanji in državno politiko najbolj zaostrena.

*KLJUČNE BESEDE:* družbena gibanja, kritika države, Latinska Amerika, politične strategije, razpršena moč

### **Trails of power and struggle: A critique of the state through the Latin American experience of resistance**

*ABSTRACT:* The aim of the article is to point out the problems confronting the fight to change the world through fighting for power. Deriving from the thesis that the means equal the goals and that the specific forms of oppression are inscribed into the mechanisms of taking the state, it is necessary to broaden the existing critique of the relations of power by including the critique of the state. The article seeks to show that all mechanisms which tear power and political organisation out of the community carry within themselves the seeds of their own corruption, of alienation and authoritarianism. Our analysis is mostly based on cases from Latin America where tensions between social movements and the state are most severe.

*KEY WORDS:* social movements, critique of the state, Latin America, political strategies, dispersed power

## 1. Uvod

21. januarja 2006 je na obrobju jezera Titikaka, med vršaci Andov, prisegel prvi staroselski predsednik Bolivije Evo Morales. Čeprav so izvolitev MAS (Movimiento al Socialismo) mnogi dojemali kot vrhunec staroselskega upora, ki se je začel z bitko za vodo v Cochabambi pet let pred tem, pa bi bila bolj pravilna ugotovitev, da je izvolitev aymara<sup>1</sup> predsednika zgolj ena izmed epizod v 500-letnem boju staroselcev za avtonomijo, samoorganizacijo in demokracijo. Izvolitev predsednika nikakor ni vrh, zaključek ali kulminacija dolgoletnega boja Galeanovih ničetov (glej Galeano 2010: 65), kar dokazuje tudi govor novega predsednika: »Nadzorujte me. Če ne morem napredovati, me potisnite, bratje in sestre. Stalno me popravljajte, kajti lahko, da se bom motil« (v Hylton in Thomson 2007: 1). V njem je mogoče zaslediti načela, ki poganjajo staroselsko družbeno ureditev. V zadnjih letih jo najbolj uveljavljajo zapatisti iz jugovzhodne regije Chiapas v Mehiki s svojimi načeli ubogljive vlade – to so načela vodenja z uboganjem, kjer je funkcija izvoljenih zgolj administrativna, saj izvršujejo odločitve, ki jih je sprejela samoorganizirana baza.

A že prvo leto po izvolitvi je vlada Eva Moralesa naletela na kritične odzive s strani baze, ki jo je spravila na oblast. Oscar Olivera, eden ključnih glasov vojne za vodo v Cochabambi iz leta 2000, je že prvo leto vladanja MAS-a označil za obdobje kooptacije avtonomnih gibanj, uničenja svobodnih prostorov organiziranja, krepitve in nadaljevanja ekstrakcijskega modela razvoja. To kritiko v delu o bolivijski politični zgodovini zapišeta tudi Hylton in Thomas (2007), ki v MAS-u prepoznata silo demobilizacije, deradikalizacije in hegemonizacije, s čimer pa ne zanikata reformnih programov, ki so izboljšali življenje številnim revnim v Boliviji. Podobne kritike je moč nasloviti na vse t. i. revolucionarne vlade, ki so uvedle bolivarsko revolucijo v Venezueli, kulturno revolucijo v Boliviji ali pa državljansko v Ekvadorju. Če je bil Morales izvoljen, da spremeni ekonomski in politični model delovanja države, potem je na obeh področjih zgrešil, saj ohranja ter krepi institute strankarske demokracije, hkrati pa je paradigma razvoja še vedno pljenje naravnih virov z malce bolj socialno naravnano redistribucijo bogastva.

Kljub temu mnoga gibanja na zahodu v vladah Latinske Amerike prepoznavajo resne alternative kapitalizmu, pri čemer spregledajo funkcijo teh vlad ravno pri reprodukciji in celo krepitvi kapitalističnih razmerij produkcije in življenja.<sup>2</sup> Naša kritika te vizije je enaka Marxovi kritiki Platonove Republike, ki jo opiše kot idealizirano

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1. Staroselci so večinsko prebivalstvo v Boliviji, med katerimi sta največji skupini Aymara in Quechua.
  2. Druga reakcija progresivnih gibanj t. i. razvitega sveta pa je popolna ignoranca do dogodkov v Latinski Ameriki, ki meji na zanikanje. Costas Douzinas je na primer na Subversive forumu v Zagrebu leta 2013 trdil, da se od leta 1968 pa do gibanja Occupy na področju družbenih gibanj ni dogajalo veliko, pri čemer ni bilo jasno, ali gre za primer nevednosti ali evropocentrizma. Tako ne zanemari zgolj alterglobalizacijskih gibanj, ampak veliko bolj mogočne, močne in učinkovite boje zapatistov, piqueterosov, bolivijskega boja za plin in vodo ...



podobo obstoječe antične družbe, nikakor pa ne zasluži statusa utopije, ki bi to dobo presejala. Ta vizija svet še vedno motri v terminih obstoječe realnosti, kar odlično ponazarjata ohranjanje fetiša rasti ter sledenje in podrejanje vlad Latinske Amerike ekonomskim kazalcem. Progressivna gibanja v pragmatizmu pogosto niso sposobna misliti onkraj obstoječega in si niso sposobna zamišljati drugačnega sveta.<sup>3</sup> Je cilj res zgolj enakopravnejša redistribucija znotraj parametrov obstoječega sistema odtujitve, plenjenja, izkoriščanja in zatiranja? Ali pa želimo in moramo iti preko tega? »Strinjanje s pravili nujno pomeni delovanje v njihovem okviru, kar predvidljivo pomeni prevzem, institucionalizacijo, poraz; popuščanje pomeni, da izgubiš, še preden začneš delati« (Merrifield 2011: 9). To pa nujno pomeni, da je treba kritiko obstoječega sistema strukturiranja družbenih odnosov in prakso upiranja zastaviti precej globlje in tudi širše.

Običajno poslušamo, kako je strankarska politika v duhu realizma, medtem ko gibanja onkraj države zaznamuje utopizem. A kot trdi Holloway: »Na prvem mestu ni materializem, ampak negativnost« (2004: 28). Človek je ekstatično bitje, ki gre onkraj sebe, ki zanika realnost in jo poskuša preseči. Sklicevanje na realizem pa ravno zanika to temeljno človekovo značilnost iti onkraj sebe, zato je realizem vedno v duhu reprodukcije obstoječih razmerij moči. Na podoben način se je tudi marksizem ujel v past znanstvene analize, s tem pa je zanikal ravno negativno komponento utopije, ki ga je delala političnega. Treba je na novo afirmirati domišljijo, odprtost in negativnost, iz česar je izpeljan tudi politični projekt magičnega marksizma Andyja Merrifielda:

»Magični marksizem /.../ ni več marksizem 'znanosti', znanosti razkrivanja dejanskih resnic, skritih za varljivim videzom; raje je izumljanje drugih resnic, širjenje horizontov možnega, kazanja, kako lahko ljudje spremenijo projekt življenja v življenjski-projekt, ki cveti« (2010: 18).

Članek izhaja iz pozicije, da je realnost treba spremeniti in da je naloga vednosti premišljanje orodij doseganja sprememb, ki jih je treba reflektirati, preizkušati in krepiti. Treba je narediti vidne prakse, ki jih trenutna oblastna struktura zakriva, in hkrati pomagati širiti že obstoječa polja in prakse svobode (glej de Sousa Santos 2003). V času, ko se v t. i. naprednem svetu ponovno postopoma in počasi prebujata socialistična tradicija ter se premišlja in preizkuša socializem za 21. stoletje, kot je svoj politični projekt iz t. i. razvijajočega se sveta imenoval Chavez, je treba stališča in metode revolucionarnih projektov še močneje premišljati. Namen članka, ki si za izhodišče jemlje anarhistična načela horizontalnosti, avtonomije in neposredne demokracije, je ponuditi prijateljsko kritiko socialistične strategije in jo označiti za prekratko ter na trenutke celo nevarno in neproduktivno. Zvestobo, zaveznitvo in prijateljstvo lahko anarhizem in komunizem drug drugemu nudita le prek iskrene in rigorozne kritike, skupnega dialoga, izmenjave mnenj in kolektivnega udejstvovanja. Članek zato »vztraja zlasti pri tem, da morajo biti posameznikova sredstva združljiva z njegovimi cilji; svobode ni mogoče ustvariti

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3. David Graeber poleg etnografskega pristopa pri oblikovanju anarhistične nizke teorije izpostavi ravno to utopično razsežnost misli. Treba je izhajati iz predpostavke, da so obstoječa razmerja kontingentna, konstruirana in nikakor ne nujna, da je drugačen svet mogoč. Hkrati Graeber v svoji značilni cinični maniri dodaja, da težava stalinistov nikakor ni bila njihova utopičnost, ampak ravno manko domišljije (glej Graeber 2013: 11–15).

z avtoritarnimi sredstvi; pravzaprav je treba v odnosih s prijatelji in zavezniki, kolikor je le mogoče, urediti družbo, ki si jo želimo ustvariti» (Graeber 2013: 10–11).

## 2. Onkraj česa?

»Edina vrlina Moči je, da na koncu nujno proizvede revolucijo proti sebi.«

*Subcomandante Marcos*

Gramsci je zapisal:

Zato lahko rečemo, da vsak človek spreminja samega sebe, se preoblikuje toliko, kolikor spreminja in preoblikuje ves kompleks odnosov, v katerih je središče spleta. V tem smislu je pravi filozof lahko samo politik, to je aktiven človek, ki spreminja okolje – če kot okolje razumemo celoto odnosov, ki jih navezuje in v njih sodeluje vsak posameznik. Če je individualnost celota teh odnosov, potem pomeni preoblikovanje lastne osebnosti preoblikovanje teh odnosov (1974: 378).

Če izhajamo iz tega zapisa in posameznika dojamemo kot vozlišče odnosov, v katere vstopa (glej tudi Balibar 2002; Balibar 2008), potem nujno sledi, da je zavzetje obstoječih razmerij moči odločno premalo za revolucijo vsakdanjega življenja. Še več, drznil bi si trditi, da je strategija napačna, saj državni aparat dojema v instrumentalnem smislu, kot nevtralno orodje, ki omogoča rekonfiguriranje družbenega sveta v skladu z idejo o dobri družbi. Tudi če pustimo ob strani kritiko, da je dobro družbo možno misliti ali jo celo ustvariti prek dekreta, je ideja, da se v načrt organizatorjev družbenega življenja struktura države ne vpleta, naivna. Prostor države je strukturiran na specifičen način. Takšen, ki krepi in ohranja hierarhije, ki odtuja moč in avtonomijo, ki šibi uporni potencial vsakdana.

Od najbolj grozljivih diktatur do najbolj čistih demokracij je nacionalna država vedno bila in bo struktura dominacije ter nadzora nad populacijo, /.../ da bi jo z uporabo svojega legalnega monopola nad silo na koncu predala v sluzenje kapitalu. Država je idealen kolektivni kapitalist, varuh teh interesov in deluje kot diktatura tudi v najbolj modernih demokratičnih državah (Esteve 2013).

Ključni mehanizem, ki je vpisan v državo in ki v temelju zaznamuje njen potencial za oblikovanje drugačne družbe, je ločitev moči od baze, ločitev političnih struktur od družbenih. To Raul Zibechi v knjigi *Dispersing Power* (2010) uporabi kot ključno kritiko boja za spremembo sveta prek boja za oblast v obliki avantgardne stranke, ki prek oblastnih struktur upravlja z družbo. Ko opisuje tradicionalne staroselke strukture skupinskega bivanja, ki se v skupnosti Aymara v Boliviji odražajo v nediferenciranih komunalnih sistemih,<sup>4</sup> poudari ravno to združitev politične in družbene ureditve. Že v začetku in naslovu svojega dela poudari, da združitev političnega organiziranja z

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4. Koncept, ki ga vpelje aymara sociolog Patzi, opisuje družbeno organiziranost staroselskih skupnosti v mestih, kot so El Alto in Cochabamba. V takšni ureditvi ni ločitve med tistimi, ki imajo moč, in tistimi, ki se ji podrejujejo, ampak je družbeno tkivo premeženo z odnosi deliberacije in odločanja, s tem pa je moč razpršena. Kot odličen primer manka delitve na oblast in bazo izpostavi trenutke upiranja. Ista organizacijska tvorba lokalnih skupščin, ki oblikuje in ohranja vsakdanje življenje, skrbi za koordinacijo boja in obrambe, tako da se ne vzpostavi ločnica med vojsko in civilnim prebivalstvom (glej Zibechi 2010: 13–17).

družbenim urejanjem producira razpršitev moči, takšna oblika moči (ki je seveda moč za in ne moč nad) pa preprečuje strukturiranje zatiranja, saj krepi skupnosti in opolnomoči posameznico. Običajno strukturiranje politike parlamentarne demokracije pa temelji ravno na ločitvi organizacije od baze, politike od družbe, boj pa s tem prevzame organizacijske modele struktur, proti katerim se bori – vojske, cerkve, države, kapitala. Izhaja iz metaforike vojaškega stroja in taylorističnega organiziranja dela: »Oba ustvarjata centralizirana in poenotena telesa, ločena od vsakdanjega življenja, zato da bi vodila družbo, vsiljevala homogenost od zunaj in oblikovala svet v skladu z željami tistih, ki zasedajo najvišje položaje« (Zibechi 2010: 45). Socialistična politika, ki temelji na oblikovanju stranke in zavzetju države, se pravi na ohranjanju ločnice med odločevalci in bazo, med politiko in družbo, tako reproducira oblastna razmerja kapitalizma, ki po Marxu temeljijo ravno na delitvi dela na mentalno in fizično. Če uporabimo znano Marxovo primerjavo čebele in človeka, ugotovimo, da v tej delitvi dela status človeka, se pravi tistega, ki si zamišlja drugačno realnost in te svoje ideje vpisuje v to realnost, pripada le eliti odločevalcev, medtem ko je večina degradirana na status izvrševalcev danih nalog.<sup>5</sup>

Kritiko običajne socialistične politike lahko še zaostriamo in jo postavimo na teren, iz katerega ta politika izhaja – to je kritika politične ekonomije. Temeljna značilnost buržoazne družbene ureditve je ločitev ekonomije od politike, kar v idealnem svetu kapitalizma predstavlja prosti trg brez poseganja drugih družbenih dejavnikov. Kupec in prodajalec naj bi transakcije opravljala v popolnem vakuumu, kjer razen racionalnosti ni drugih dejavnikov, ki bi vplivali na njuno odločitev, hkrati pa njuno razmerje nima posledic za svet okoli njiju. »Kupec in prodajalec koristita sama sebi in se ne menita za vpliv na druge« (Albert 2014: 2). Ekonomijo se tako dojema kot dejavnost, zunanjo družbenim odnosom na ravni vsakdana. »Namesto da bi bila ekonomija vpeta v družbena razmerja, so družbeni odnosi vpeti v ekonomski sistem« (Polanyi 2008: 118). Naloga politike tako postane, da od zunaj posega v ekonomsko mašinerijo, jo kroti, usmerja, brzda ali pa poganja, krepi in se ji prilagaja. To je temelj keynesianske ekonomske politike, ki želi prek povečane potrošnje državnih investicij krotiti zver kapitala in ga prilagajati človekovim potrebam. Podobno strategijo vpelje tudi socialistična politika, ki prek zavzetja države te temeljne delitve ne preizprašuje, napada ali pa v praksi spreminja. Še več, zavzetje države to delitev potrjuje, saj ohranja politiko, ločeno od ekonomije, tudi če se posegi prve v drugo krepijo in množijo. Osnovna matrica ostaja enaka, kar pa pomeni, da je zavzetje države odločno premalo.

Predstavniška demokracija, strankarske strukture in državna oblast proizvajajo lastno pogubo in korupcijo, kar je že vpisano v temeljni mehanizem politične organizacije. Bistvo njihovega delovanja je poleg zgoraj omenjene ločitve politike od družbe,

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5. Albert (2014) kot alternativo kapitalizmu izpostavlja participatorno ekonomijo, ki temelji ravno na ukinitvi delitve dela na odločevalske in izvrševalske funkcije. Na tem mestu moramo tudi poudariti obratno razmerje v staroselskih skupnostih, kjer je funkcija vlade, da uboga in izvršuje ukaze baze. Imeti moč pomeni, da si podrejen ukazom baze, da zgolj izvršuješ naloge, ki so ti bile dane. Tako delujejo sveti dobre vlade pri zapatistih, delovna telesa skupščin v mestu El Alto.

katere subjektivni odraz je občutek odtujenosti, tudi centralizacija moči v rokah vrha organizacije. To se dogaja na mnogotere načine, in primeri iz preteklosti ter sedanjosti nas morajo opomniti, da imamo opraviti s strukturnimi nujnostmi, in ne s partikularnimi odkloni (glej npr. Prevost in dr. 2012). Celotna struktura političnega udejstvovanja in izobraževanja polaga moč in odgovornost v roke sicer izvoljenih izbrancev, a s tem hkrati od političnega procesa oddaljuje večino. Ta depolitizacija, če politiko razumemo kot skupno upravljanje s skupnimi zadevami, poteka na načine kompleksne latovščine, ki moč polaga v roke strokovnjakom, delitve dela, kjer je monotona, poneumljajoča repetitivna večini vsiljena zato, da je lahko manjšina kreativna, fragmentacije življenja in nalog tako, da so procesi ločeni, institucionalizirani in kooptirani. Liberalna demokracija tako sistematično proizvaja lastno pogubo in korupcijo. Pogoji preživetja tega tipa demokracije so močni sistemi varovalk, nadzorov, transparentnosti, kar pa predpostavi mogočno, močno in živo civilno sfero. Elitna demokracija ali demokracija elit pa z lastnim sistemom delovanja, z depolitizacijo, predstavnostvom in odrivanjem ljudi iz politike razžira ravno sfero, ki jo dela živo, jo omogoča in krepi. To so sistemi odrivanja ljudi iz politike, ki naj bo domena elit in tehokratov (to meni že Aristotel), saj so le oni sposobni delati pravilno. Ljudje ne vedo, kaj hočejo, ali ne razumejo, kaj se dogaja, kar vodi v diskvalifikacijo protestov kot invazije horde neartikuliranih, neumnih, slepih, nejasnih. Mogoče je parlamentarna politika namenoma dolgočasna, da oddalji od sebe čim več ljudi »po modernem načelu, da laž, če jo pogosto ponovimo, postane resnica, postmoderna uredba pa je, da vse, kar se pogosto ponavlja, postane dolgočasno in odvrča ljudi,« pravi Douzinas (2013: 57).

V isto kategorijo spada tudi uničenje skupnih prostorov deliberacije, koordinacije in organizacije. Liberalna demokracija temelji na mediaciji partikularnih zahtev in problemov prek kompleksnih kanalov do države, ki bo poskušala zadeve urediti. Privatizacija problemov in trganje skupnosti pomeni, da ljudje postanejo Leibnizove monade, ki so ločene od drugih in nesposobne kolektivnega delovanja.<sup>6</sup> »Zasebno' kolonizira 'javno'; 'javni interes' je skrčen na radovednost o zasebnih življenjih javnih osebnosti in umetnost javnega življenja je zožena na javno prikazovanje zasebnih zadev ter javne izpovedi zasebnih občutij (čim bolj so intimne, tem boljje)« (Bauman 2002: 48–49). Skupne težave postanejo zasebne, javna sfera pa se spreminja v izmenjavno bolj ali manj uspešnih rešitev individualnih težav (mogoče lahko v tej luči razumemo eksplozijo »self-help« forumov). Vse to vodi v žalostno, depresivno zasebnost, kjer prevladujejo le nemoč, tesnoba, individualna krivda in največja bolezen postmoderne dobe – cinizem.

Sam način strukturiranja in organiziranja politike vpliva na njene posledice, kar pomeni, da je pot enaka cilju. Struktura družbe proizvaja specifične subjekte, kar vodi v dejstvo, da enake organizacije kljub drugačnim ciljem producirajo podobne

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6. Podobno kritiko nevladnim organizacijam nameni Mike Davis v svojem delu *Planet slumov*, ki jih razume kot vato med izkoriščanimi in izkoriščevalci, kot ventile sproščanja odvečne napetosti, da družba ne eksplodira. Meni, da »so nevladne organizacije 'novi razred' posrednikov, ki si z blagoslovom tujih filantropov prilaščajo avtentične glasove revežev« (2008: 106).

subjekte. V svojem delu *Declaration* (2012) Hardt in Negri opišeta štiri ključne subjektivnosti, ki jih producira sedanja ureditev. To so: zadolžen, mediatiziran, zavarovan (*securitized*) in reprezentiran posameznik; za potrebe tega članka se osredotočamo zgolj na zadnjo. Reprezentiran posameznik je odtujen od lastne moči organiziranja, saj to predaja drugim. Produkcija in kontraizobraževanje subjektov kot pokornih in poslušnih je temeljni del delovanja parlamentarne demokracije, ki priznava zgolj eno pot političnega delovanja – to je delovanje v organizaciji, ki s pomočjo birokratskih kanalov prek ovinka zadovoljuje potrebe ljudi, ki so del te organizacije. Ni neposredne participacije v političnem življenju, ampak so posegi zgolj sekundarni, zunanji in odtujeni. Še več, funkcija teh organizacij, ki so odtujene in iztrgane iz vsakdana, ni reprodukcija ali celo izboljšava vsakdana, ampak reprodukcija lastnih pogojev obstoja, se pravi reprodukcija samih sebe.

### 3. Kako?

*»Kjer ni spontanosti, se nič ne dogaja.«*

*Henri Lefebvre*

Če problematiko ponovno zastavimo prek strategije boja za družbene spremembe, ugotovimo, da sistem delegacije, centralizirane organizacije ter delitve na vrh in bazo nikakor ni najbolj stabilen, varen ali gotov proces spreminjanja sveta. Pustimo ob strani vprašanje prehodnega obdobja, ki naj bi nekje v daljni prihodnosti vodila do popolne družbe (na primer podpredsednik Bolivije in ideolog MAS-a Garcia Liera trdi, da je ekstrakcijski model razvoja, ki ga sedaj že bolj iskreno imenuje amazonski kapitalizem, edina prava pot do socializma), in se posvetimo zgolj strateškemu vprašanju. Prvo vprašanje, ki ga je treba razrešiti, je vprašanje varnosti revolucionarnega procesa, se pravi, kako se je sposoben braniti pred zunanjimi in notranjimi nasprotniki. Sistem delegacije vodenje, organizacijo in zamišljanje velikih družbenih sprememb prenese na majhno skupino bolj ali manj sposobnih delegatov, kar je nevarno početje. To lahko ponazorimo s Freudovo analizo množice, ki jo skupaj drži voditelj – ko je voditelju odsekana glava, razpade tudi množica sama (ta proces lahko spremljamo v Venezueli po smrti Chaveza). S tem sistem sprememb izpostavimo veliki nevarnosti kooptacije, uničenja in korupcije. Hkrati postanejo spremembe odvisne od elit (delegatov), saj so ljudje, ki podpirajo elite, od procesa sprememb odtujeni, mu ne sledijo, ga ne razumejo in so ga nesposobni braniti.<sup>7</sup> Smrt vrha tako nujno pomeni smrt revolucije. Zato je treba bolj aktivno vključiti bazo, vendar ne zgolj prek procesov poizvedovanja (se pravi raznih statistik), ampak z delegacijo moči na ljudi.

Vzemimo primer Venezuele,<sup>8</sup> kjer t. i. socialistična oblast gradi socializem 21. stoletja prek bolivarske revolucije. Proces naj bi se začel z izvolitvijo Chaveza za

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7. V nekem intervjuju zgoraj omenjeni Olivera poudari, da marginalizirani ne bodo branili procesa kulturno-staroselske revolucije v Boliviji, saj se je ta popolnoma odtujil od potreb ljudi in zaživel lastno življenje. Tudi bolivarske revolucije verjetno ne bodo več spontano ščitile množice, kot se je dogodilo ob državnem udaru leta 2002.

8. Pri opisu stanja se opiram na Badalič (2011) in Gregorčič (2011).

predsednika leta 1998, kar naj bi odprlo možnosti revolucionarnih sprememb v deželi, kjer so zadnjih nekaj desetletij vladale neoliberalne vlade. Vlada naj bi prek programov socialne redistribucije, oblikovanja na tisoče zadrug in raznolikih modelov participatorne ekonomije in izobraževanja ter s krepitvijo mehanizmov soupravljanja države prek referendumov odprla politični proces za prej marginalizirane, jih vključila v politično deliberacijo in odločanje ter s tem gradila demokratični socializem. A če potek venezuelske politike pogledamo pobliže, ugotovimo, da zavzetje oblasti ni odprlo politične strukture, ampak ravno obratno – da je ljudska vstaja odprla pot za zavzetje oblasti. Ključni trenutek venezuelske zgodovine je leto 1989 (ki je mimogrede tudi leto konca zgodovine po Fukuyami), ko Caracas eksplodira zaradi dviga cen osnovnih dobrin, kar vodi v večdnevne hude boje s policijo in ropanje trgovin, ki jih lahko razumemo kot reappropriacijo presežne vrednosti s strani ububožanih prebivalcev slumov. Dnevov protestov, ki so jih nato poimenovali Caracazo, ni organizirala nobena stranka niti gibanje, ampak so svojo moč črpali iz samoorganizacije obupanih in marginaliziranih. Šele ta eksplozija je odprla politični prostor Venezuele, ki ga je od padca diktature iz 60. let zaznamoval dvostrankarski sistem nepremične točke, v katerem se na oblasti izmenjujeta dve formi (stranki) z enako vsebino.

Še več, to, kar je danes najbolj navdihujoče pri venezuelskem procesu družbene transformacije, ni posledica zmage Chaveza, ampak pritiska baze. Chavez je bil izvoljen leta 1998 s klasičnim reformnim programom socialne demokracije. Ker je bil celo ta program preradikalen za državo svetovnega juga z ogromnimi zalogami nafte, je opozicija (z javno in tiho podporo ZDA) leta 2002 ob pomoči zasebnih medijev izvedla državni udar. A zapletlo se je z vstajo ljudi, ki so blokirali predsedniško palačo, zasedli ulice, ceste in se spopadali s policijo. Chavez je bil po dveh dneh vrnjen ljudem in je ostal legitimen predsednik.<sup>9</sup> Spoznanje, da lahko preživi le ob izraziti, radikalni, množični podpori ljudi, je vodilo v radikalizacijo bolivarijanskega procesa. Začele so se ustanavljati kooperative, lokalne skupščine, avtonomne regije, komune, ki so postale jedro procesa sprememb. Ta radikalizacija ni nastala zaradi dobre volje Chaveza, ampak zaradi mogočnega pritiska ljudi – decentralizacija in opolnomočenje ljudi sta bila edini način, da proces preživi napade notranje mogočne elite in zunanje invazije. Zato moramo vzklik »Mi smo Chavez!« jemati zelo dobesedno.

Naslednje je vprašanje odtujenosti ali vključenosti čim večjega števila v proces sprememb. Delegacija moči in upravljanja družbe na redke izbrance večino ljudi odtuja od političnih sprememb. Posegi baze v politiko so sekundarni in mediirani, saj vedno potekajo ali naknadno (revolt proti nezaželeni odločitvi) ali pa prek odtujenih orodij birokracije. S tem postane baza odvisna od elit, in ne elite od baze (kar mimogrede ravno pomeni konsolidacijo oblasti). Tako nikoli ne vemo, kdaj politiki pišejo reforme za politične točke, kateri lobi stoji za njimi, kako so se izpogajali z ostalimi strankami. Stranka je notranje strukturirana organizacija z lastnimi pravili, ki se ne skladajo nujno z družbenimi potrebami. Predstavniški model demokracije tako preneha

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9. Za dober prikaz vloge zasebnih medijev pri državnem udaru glej dokumentarni film *Revolution will not be Televised* (2003).

predstavljati ljudi; postane sistem lastne reprodukcije strankarskih elit. Strankarska struktura zaživi lasten sistem in kot v vsakem sistemu je njegova ključna težnja, da se reproducira. Takšen sistem, ki je v temelju tehnokratski, predpostavi, da elita »ve bolje od drugih, kako je treba upravljati zadeve teh drugih« (Graeber 2013: 12), zato ni naključje, da mnogi politiki svojo vizijo zamenjajo za znanstveno realnost in jo začno nasilno uresničevati. Liberalna demokracija je tako primorana razvijati kopico institucij transparentnosti in boja proti korupciji, ki pa ne naslavljajo osnovnih težav institucionalne ureditve, ki vso moč polaga v roke odtujenih elit. Ta proces oddaljuje ljudi, jim jemlje avtonomijo, moč. Zato je treba decentralizirati moč vrha na bazo, s tem pa institucionalno preprečiti monopolizacijo, korupcijo in nepotizem. Kot pravi Fanon: »Vrh dobiva svojo moč in trdnost iz obstoja bojujočega se ljudstva. Če smo natančni, moramo reči, da je ljudstvo tisto, ki se po svoji volji predaja vrhu, ne pa, da vrh dopušča ljudstvo« (2010: 167). Ali kot zapiše Nobelova nagrajenka Rigoberta Menchú iz Gvatemale: »Razumeli smo, da je vloga voditelja predvsem usklajevati boj, poganjajo pa ga predvsem naši tovariši. Prav ti naši tovariši so zmožni svoj boj tudi voditi« (Burgos 2012: 273).

Najbolj nedvoumna značilnost revolucije je neposredno vmešavanje množic v zgodovinske dogodke. V običajnih časih se država, naj bo monarhična ali demokratična, povzdigne nad narod in zgodovino oblikujejo specialisti v sledečem vrstnem redu – kralji, ministri, demokrati, parlamentarci, novinarji. Ampak v tistih ključnih trenutkih, ko postane stari red za množice nevzdržen, te prebijejo mejo, ki jih izključuje iz politične arene, pometejo z njihovimi tradicionalnimi predstavniki in z lastnim vmešavanjem ustvarijo začetno osnovo za nov režim (Trocki 2008: xv).

Kar povezuje vsako upiranje, je želja po obvladovanju lastnega življenja, ki se jo poskuša onemogočiti, vpreči in prevzeti. Je boj proti negaciji življenja. To je pisalo zgodbe, ki jih pripovedujemo o revoluciji, zgodbe, kot so eksodus, Spartak, Tupac Amaru II. v džunglah Latinske Amerike, francoska revolucija, upor sužnjev na Haitiju, ruska revolucija, dolgi marš na Kitajskem, Kuba, protikolonialni boji Afrike ... Zgodba vedno opisuje način, kako so ljudje vzeli (ali poskušali vzeti) življenje v svoje roke. Temeljna značilnost upiranja je želja po avtonomiji, želja imeti glas, biti prepoznan in priznan, želja spregovoriti, delovati, vplivati (kar pogosto pomeni preživeti). Ko spregovorijo tisti, ki ne morejo ali ne smejo. Ali kot zapiše Rancière: »Politika obstaja, kadar je naravni red gospostva pretrgan z vzpostavitevijo deleža tistih brez deleža« (2005: 27). Ravno to pretrganje obstoječega reda, ki negira človeška življenja in njihovo ureditev, je trenutek, ko človek resnično zaživi. To so trenutki množične evforije, občutkov svobode in moči, čas neverjetne kreativnosti in družbene solidarnosti, prostori kolektivnega soustvarjanja, mišljenja in kreiranja. Ni naključje, da večina samoorganiziranih skupnosti govori o dostojanstvu, se pravi spoštovanju in avtonomiji. Kot pravi Emilo iz argentinskega Tierra del sur: »Mi nismo več marginalni subjekti – prazni in izločeni – ampak smo sedaj zgodovinski subjekti, aktivni subjekti, participirajoči subjekti. Mi smo akterji v naših lastnih življenjih« (v Sitrin 2006: 219). Dostojanstvo kot temeljno načelo politike pomeni, da imaš možnost avtonomne samoorganizacije lastnega življenja.

## 4. Kam?

»Nihče se ne osvobodi sam in nihče nikogar ne osvobodi.«

Marta Gregorčič

Ko Badiou v svojem delu *The Rebirth of History* (2013) govori o arabski pomladi, večino časa nameni zvestobi dogodku, ki ga razume kot čas, ko si tisti, ki jim je zanikan obstoj, izborijo vidnost. Kar poimenuje organizacije, je ravno poskus ohranitve značilnosti, ki zaznamujejo dogodek, se pravi štetje tistih, ki ne štejejo. Zato se je treba osredotočati na trenutke preloma, izbruhov in misliti načine, kako te situacije ohranjati čim dlje odprte. Če se osredotočamo na uporno rajanje, na zavzetje ulic, ugotovimo, da jih zaznamujejo karnevalskost, magičnost, kolektivna vsemogočnost, sočutnost, energičnost ... To so trenutki, ko človek začuti in misli svojo totalnost, svojo vpetost v svet in spetost z drugimi soljudmi. Ko se dojame kot bitje zgodovine, na katero lahko vpliva, jo usmerja in nadzoruje. Podobne izkušnje in občutki govorijo iz mnogih prizorišč, pa naj bo to Buenos Aires leta 2001 ali pa Tuzla leta 2014. Biti protagonist je ključen občutek in orodje, ki nam ga mehanizmi predstavnštva in hierarhij stalno poskušajo iztrgati. Kot zatrdi udeleženec v četrtni skupščini MTD Chipoletti iz Argentine: »Prek participacije v gibanju se začneš počutiti koristnega, kot da imaš mesto. Veš, da je tvoje delo koristno za kolektiv. To je občutek pomembnosti, kot da imaš smisel in si ponovno prilastiš vse stvari, ki ti jih je sistem vzel. Počutiš se živega« (v Sitirin 2006: 149).

Besede, ki jih je v antropološki analizi samoorganiziranja v Argentini najpogosteje slišala Marina Sitrin, so dostojanstvo, protagonizem, horizontalnost, kreacija, participacija, samoupravljanje. Vse te besede merijo na samoorganizacijo življenja, na spajanje politike in vsakdana. Merijo na tisto, kar je Raul Zibechi poimenoval razpršena moč, ki se decentralizira in prežema celotno družbeno tkivo. Če je Trocki ugotavljal, da se revolucije dogajajo iz nujnosti oziroma iz nevzdržnosti dane situacije, potem je treba ugotoviti, da so ključne spremembe, na katere merijo upori, ravno spremembe v vsakdanu ljudi. »Ne borijo se za domnevno idealno družbo, ki je zunaj izkustva, pač pa za preoblikovanje svoje neposredne situacije« (Gregočič 2005: 93). Zato je treba tudi organizacijo, ki bo zvesta dogodku množičnega upiranja, utemeljiti v vsakdanu, v reorganizaciji le-tega po potrebah in zmožnostih vsake posameznice. »Predpogoj za konstitucijo organizmov kontraoblasti je ustvarjanje in prakticiranje novih družbenih odnosov, ki niso izvzeti iz vsakdanosti« (Ouvina 2005: 42).

Tu se lahko opremo na koncept »pravice do mesta«, ki ga je konec 60. let vpeljal Lefebvre, v zadnjem času pa ga razvija David Harvey (2012). To je pravica producentov, tistih, ki bivajo, oblikujejo in živijo urbano življenje, da kolektivno odločajo o procesu in smeri produkcije urbanega. Tisti, ki producirajo mesto, imajo primarno pravico, da ga oblikujejo po svojih potrebah. Pravica do mesta je tako nujno kolektivna pravica, je »sposobnost, da delujemo po lastnih potrebah v prostoru, ki si ga po nujnosti delimo z drugimi« (Khasnabish 2010: 89). Takšna koncepcija pravice in boja hkrati iztrga fokus iz privilegiranih mest ter ga zveže s totalno izkušnjo vsakdana. Središče boja ni več država ali delovno mesto, ampak je skupnost vsakdana v vseh svojih razsežnostih. »Razlike med bojem, osnovanem na delu, in bojem, osnovanem na skupnosti, začenjajo



izginjati, prav tako tudi ideja, da sta razred in delo definirana v prostoru produkcije ter v izolaciji od prostorov družbene reprodukcije v gospodinjstvu» (Harvey 2012: 139). Središče politike tako postane kolektivno organiziran vsakdan, produkcija vsakodnevnih odnosov, ki opolnomočijo posameznico. Kot zapiše Emile Pouget v svojem pamfletu *Direktna akcija* iz začetka 20. stoletja:

[Direktna akcija] pomeni, da delavski razred v stalnem boju proti obstoječemu stanju stvari ne pričakuje ničesar od zunanjih ljudi, moči in sil, ampak raje ustvarja lastne pogoje boja in sam išče svoja sredstva za delovanje. Pomeni, da proti obstoječi družbi, ki priznava zgolj državljana, vstaja producent (Pouget 2003: 1).

Temeljno razliko med političnimi projekti, ki se deklarirajo za leve, a postopajo po različnih poteh, lahko enostavno ponazorimo z drugačnim govorom, ki jih prepreda. Če pri projektih, ki temeljijo na hierarhičnih organizacijah zavzetja države, običajno govorimo o posamezniku (zelo redko o posameznicah), ki je aktiven, pa pri gibanjih, ki so vpeta v vsakdan boja, govorimo v množini. Temeljna razlika je med govorom, ki poudarja moč in sposobnost voditelja (npr. Lenin je storil, Chavez je uvedel ...), in tistimi, ki govorijo o kolektivu (npr. zapatisti producirajo, piqueterosi organizirajo ...). Že ta majhna govorna razlika kaže na način organiziranja politike.

Chavez je hotel socializem uveljaviti z dekretom, od zgoraj, z referendumom, a ljudje so temu rekli ne. Pa ne zato, ker bi bili desničarji, ampak zato, ker hočejo ustvariti socializem od spodaj. Ne moremo si dovoliti, da kdo pride s projektom, ki ga je naredil sam s prijatelji, in nas samo vpraša, če se s tem strinjamo. Socializem je boj ljudstva. Gre za območja, zemljo, ki jo osvojiš, za barrio, ki ga upravljaš in kjer rastejo enote samovladanja. To je socializem. Socializem ni model vladanja, temveč model boja, to je nekaj čisto drugega (Davis v Gregorčič 2011: 254).<sup>10</sup>

Socializem je torej način organiziranja celotne družbe, je oblikovanje drugačnih odnosov, za kar pa je treba politiko misliti veliko širše.

Če vzamemo zares teoretsko dognanje, da je posameznik skupek odnosov, da »je vsak Jaz kozmos, unikatna kombinacija preteklih dogodkov, sedanjih projektov in prihodnjih aspiracij, intimnih in tujih srečanj, prečkanih cest in zgrešenih poti, čustev in razuma, etike in strasti. Unikatnost jaza je rezultat vseh drugih, ki so se dotikali, govorili in delovali z mano. Jaz sem, ker sem bil skupaj z drugimi« (Douzinas 2013: 195–196). Če je posameznik vozlišče razmerij, v katera stopa, potem je ključna politična izpeljava, da je ta razmerja nujno spreminjati, da bi lahko spremenili posameznico. Ali povedano drugače, če želimo spremeniti sebe, moramo spremeniti odnose, v katere stopamo. Ta ugotovitev pa vodi v naslednji korak politične strategije, kjer je zavzetje

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10. Indikativen primer je nastanek projekta Ojeda v zahodnem Caracasu, kjer ima center mnogo zadrug, procesov izobraževanja in raznolike modele participatorne politike. Kjer je prej stalo zapuščeno skladišče naftnega podjetja, se danes bohota izložba socializma 21. stoletja. A treba je biti pozoren na nastanek samega projekta, saj kaže na način izvajanja politike s strani centralizirane države. »Dvanajst let je bil prostor zapuščen, vse dokler ni predsednik Hugo Chavez pričel iskati prostora, kamor bi lahko postavil revolucionarna podjetja. V preletu s helikopterjem, ki ga je izvedel nad glavnim mestom, je našel tole,« pravi udeleženka v zadrugi Endotur (v Badalič 2011: 241). Kot da ni dovolj, da izvaja socializem z dekretom, to počne še z neba.

oblasti odločno premalo. Moč (in šibkost) elit se skriva v njihovi nenadomestljivosti znotraj sistemske politične organizacije, kjer le redki razumejo in upravljajo sistem. Kar potrebujemo, so nadomestljive elite, bolje rečeno elite, katerih moč bo decentralizirana na bazo. Tako je trditev, da se mora vlada bati ljudstva, absurdna v luči spoznanja, da je nujno, da vlada postane ljudstvo.

Namen prispevka se tako zlije v dvojno politično prepričanje, da sta realizem in iz njega izhajajoča pragmatična drža zavzetje države strategiji, ki blokirata boj za spremembo sveta. Zavzetje države zgreši, ker predpostavi, da je cilje mogoče ločiti od sredstev, da je socializem mogoče ustvarjati z dekretom in da je kljub ohranjanju istih družbenih odnosov ločitve politike in družbe mogoče graditi novo družbo. Realizem pa v duhu pragmatizma sledi tehnokratski logiki upravljanja z obstoječo realnostjo, zato politični programi nikoli ali zelo redko presegajo status idealizirane podobe obstoječe družbe. Izkušnja Latinske Amerike nam tako ponuja lekcijo kritike države kot tudi afirmacije domišljije. Biti moramo zgolj dovolj pozorni in odprti, da si jih drzujemo začeti razumeti.

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## Summary

The main purpose of this paper is to add to the critique of the state power and the socialist strategy that perceives taking over the state institutions as the only right, reasonable and effective path to the social change. Through the theoretical analysis that is combined with the examples from Latin America paper tries to show, how this strategy lacks the rigorous critique of the state power and that it treats it naively as a neutral tool. Main tools of the analysis are anarchist perspective and especially rebellious history of Latin America, which shows how the so called socialist for 21. century has failed to prove an alternative to capitalist mode of production and especially the organization of everyday life. Through the analysis of Bolivarian revolution in Venezuela and MAS government of Bolivia, which are two leading left forces on the continent, paper shows how this two political processes continue the extractionalist model of development

based on exploitation of nature and how it still relies on capitalist measurements of success (economic indicators of development). Furthermore, it shows how political revolution is not taking place, but we are rather witnessing cooptation, pacification and even violent crackdown of the autonomous movements.

The other part of paper's critique is theoretical and tactical. Paper claims that we should not treat the state organization of political life as neutral, but as a specific kind of institutional arrangement that defines the coordinates of the struggle. The main problem of the state and party based movements is the separation between politics and the society, between leaders and those who are led. This separation is crucial and it is the main purpose behind monopolization and concentration of power in the hands of the few. These separate institutions of power eventually lose contact with the everyday life of the people and start to reproduce this separate reality rather than aim at political change. Power should therefore be dispersed throughout the social body and not concentrated. There is also tactical consideration behind this point. If the revolutionary process is led by elite it is alienated from the masses, which do not follow understand and participate in the processes of changes and are therefore unable to defend them, let alone meaningfully affect this changes.

The aim of the article is thus double. First, if see human being as the interplay of relations that she steps into, than it logically follows that taking the state power and exercising policies of more just social redistribution is too little for revolutionary change. This tactic still reproduces alienating political relationships and thus fails to recognize the state as a main mechanism for reproduction of capitalist relations of power. Second aim is rehabilitation of imagination and critique of realism. Article defends the status of utopian as essential part of political and social change. We see realism as a mechanism of reproduction of existing relations and we believe that another world is possible, we have to start at least thinking it.

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**RECENZIJJE KNJIG /  
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Anita Volčanjšek

**Dragana Alfirić in Nena močnik (ur.): Praznovanje možnosti transformacije: Gledališče zatiranih v teoriji in praksi, lokalni in globalni perspektivi. Ljubljana: Ekvilibr Inštitut in Maska, zavod za založništvo, kulturno in producersko dejavnost, 2012. (ISBN 978-961-91857-2-8)**

Rumena knjižica, konglomerat slovenskih in tujih piscev, ponuja razmišljanja in pričevanja o gledališču zatiranih. Avtorji prispevkov – tako izkušeni gledališčniki kot tudi ambiciozni začetniki – osvetlijo pomen in namen tovrstnega gledališča, v svetu znanega že več kot petdeset let. Pionirju na področju raziskovanja zatiranih, apliciranih v gledališki prostor, Brazilcu Augustu Boalu, v zborniku pripada posebno mesto. Prvič je namreč v slovenščino prevedeno njegovo temeljno delo *Poetika zatiranih*. V gledališče, prostor nešteti transformacij, gledališki teoretik in režiser uvede marginalizirane družbene skupine (prestopnike, etnične manjšine, ženske), ki naj bi z aktivno participacijo (igro) naredili korak k izboljšanju družbene mentalitete. V svojem delu namreč prikaže, kako gledališče postane orodje zatiranih, marginaliziranih posameznikov ali skupin, orodje, prek katerega se izražajo, izobražujejo o določenih tematikah, in orodje, prek katerega aktivno sodelujejo v družbenopolitičnih procesih. O svojih izkušnjah pišejo tudi ostali avtorji, katerih odmik od teoretiziranja vnaša svojevrstno svežino ubesedovanja praktičnih izkušenj. Zbornik kronološko – od sedemdesetih let pa do danes – oriše raznovrstne metode dela v nekaterih delih sveta s posebnim ozirom na zapostavljene oziroma družbi problematične skupine ljudi. Nabor vseh besedil skupaj tvori celovito entiteto spoznavanja gledališča zatiranih v – kakor je zapisano že v naslovu – lokalni in globalni perspektivi.

Navzven drobna in morda malo konfuzna – zmotijo predvsem zabrisani oziroma prečrtani naslovi posameznih prispevkov –, a vsebinsko čisto relevantna in tudi gledališkemu laiku razumljiva razprava o področju, ki v Sloveniji še ni bilo temeljito raziskano. Gledališče zatiranih je gledališče, ki se ukvarja s posamezniki, ki pripadajo različnim družbenim skupinam. »Gre za odnos, v katerem se ena od skupin okoristi na račun druge. V poskusu definiranja zatiranja se moramo zavedati daljnosežnosti pojava, ki sega preko individualnih odnosov« (str. 62). O odnosih z marginalnimi, etiketiranimi družbenimi skupinami teče beseda od prve strani pa do konca. Srž vsakega prispevka temelji na izkustvu s posameznimi krogi ljudi, ki so pod mentorstvom gledališčnika (avtorja) spoznavali tehnike gledališča zatiranih in se obenem integrirali v proces igranja, doživljanja, čustvovanja ... Ravno aktivna udeležba na vajah, na katere pa vsak prihaja prostovoljno, lahko vodi do zadovoljivega zaključka; namen tovrstnega gledališča je tudi osebna rast udeleženca, gradnja samozavesti in želja po samouresničitvi. Kakor je poudarjeno v nekaterih besedilih, pa tovrstno delo ne temelji na dialogu, značilnem za kabinete psihologov, ampak predvsem na fizičnih akcijah, telesni improvizaciji, iznajdljivosti in sposobnosti neverbalne komunikacije. Gledališče ni ordinacija za zdravljenje patoloških motenj, gledališče je (predvsem) prostor spoznavanja samega sebe in drugih ter poskus gradnje pristnih medosebnih odnosov. Udeleženci so izrazili naklonjenost projektu in delavnicam, saj so dobili prostor za druženje in obenem varno okolje, kjer so lahko izrazili svoje občutke, strahove ter reflektirali lastne izkušnje. S tem so dobili občutek družbene vključenosti, sprejetosti in produktivnosti. Zbornik ponuja zgodbe z različnih delov sveta; tako se bralec za hip zaustavi v Peruju, kjer so v sedemdesetih letih začeli – tudi prek gledaliških praks – izkoreninjati nepismenost in ozaveščati o pomenu izobrazbe. Južnoameriško gledališče zatiranih predstavi zgoraj omenjeni Boal, ki začrta pot vsem drugim ustvarjalcem. Prek spoznavanja z različnimi etiketiranimi skupinami, njihovim delom z »režiserjem« ter ovirami (nezaupanje, dvom o tovrstnem gledališkem načelu) se bralcu izriše drugačna gledališka izkušnja. Boalove tehnike so bile pri ostalih

soustvarjalnih zbornika (pedagogih) uporabljene kot začetne, ogrevalne vaje, predvsem pa so služile za vzpostavljanje zaupanja med udeleženci delavnic. V različnih delih sveta se spopadajo z različnimi težavami: ponekod sta to revščina in nepismenost, drugod nasilje nad ženskami, Romi, temnopoltimi ... V zborniku se tako prepletajo zgodbe iz Južne Amerike, New Yorka, Slovenije, kjer motivatorji/trenerji/pedagogi/jokerji v središče zanimanja vzamejo različne skupine ljudi, tudi upokojeince. Kratke zgodbe, ponekod dnevniški zapisi, so podkrepljene s fotografijami z vaj, med besedilo pa se mestoma infiltrirajo miselni vzorci in skice iz nekaterih teoretičnih priložnikov o gledališču zatiranih. Avtorji plastično odstrane skrivnosti samega procesa nastajanja »drugačne« predstave, kjer namesto profesionalnih akterjev igrajo ljudje z ulic. Vsi »na oder« stopijo prostovoljno, brez kakršnekoli besedilne predloge. Učenje, raziskovanje in razreševanje problemov določene družbene skupine poteka spontano, izven ustaljenih gledaliških norm, temelječe predvsem na individualnih izkušnjah. Metode gledališča zatiranih so bile tako uporabljene za reševanje različnih represij. V okviru prvotne, Boalove tehnike, so udeleženci uprizorili kratke prizore in nato diskutirali o potencialnih praktičnih rešitvah glede na zastavljeno problematiko.

Kljub nekaterim tipkopisnim napakam ter že omenjeni nepreglednosti naslovov in avtorjev je zbornik verodostojen prikaz procesa ustvarjanja tovrstnega gledališča, saj temelji na osebnih, torej praktičnih izkušnjah avtorjev. Teorija se umakne opisovanju dela z ljudmi in njihovimi strahovi, njihovem reševanju ter končnemu produktu – »predstavi«.

Marko Ribač

**Igor Vobič: Journalism and the Web: Continuities and Transformations at Slovenian Newspapers. Ljubljana: Fakulteta za družbene vede, 2013. 140 strani (ISBN 978-961-235-668-2), 15 EUR**

Igor Vobič v svoji kratki knjižici, napisani v angleškem jeziku, brez opomb pod črto (mišljeno kot pohvala) in s premnogo metabesedilnimi sredstvi (t. i. kažiropi), ki napovedujejo ali povzemajo (mišljeno kot kritika) ubere topični pogled na novinarstvo, profesijo, ki bi še na prelomu tisočletja knjigi namenila če že ne poglobljene debate, pa vsaj pozornost in vidne komentarje. Ker je to danes malo verjetno, so premisleki o počasni degradaciji profesije, ne da bi patetično slavili njene davno izgubljene intelektualne korenine, ki pa so najverjetneje bolj stvar imaginacije kot zgodovinske materializacije, več kot dobrodošli. Poleg tega, da veseli multiteoretski topični pristop, kjer lahko privzamemo različne poglede na preučevani predmet, Vobič obenem pokaže, kako težko je zapopasti to mnogotero intersekcionalnost družboslovnega predmeta – mikro-, mezo-, makroraven; ekonomsko, politično, pravno, spolno, rasno, kulturno pogojenost; (nad)nacionalno, regionalno, lokalno umeščenost; delavsko, honorarno, študentsko, javno, zasebno zamejenost – pri kateri si je nujno potrebno umazati roke v »kuhinji empiričnega raziskovanja«. Tako lahko to pionirsko delo vidimo v njegovi informativnosti in poučnosti, kot temeljni kamen, kot smerokaz (ki zaenkrat nakazuje štiri možne poti) za naslednje korake: večji fokus na produkcijskem procesu, posvečanje tistim vidikom novinarskega dela in ustvarjalcem, ki se kot novinarji niti ne dojemajo, preplet tehnoloških in delovnih razmer v uredništvih. Tako lahko delo služi kot zaokrožena interpretacija delovnega procesa, ki naj ga v roke vzamejo novinarji in študentje novinarstva, čeprav bi delo predlagal tudi tistim, ki v reševanju kapitalistične ekonomije in tehno-birokratske partitokracije stavijo na ideale novinarstva ter na njihovo (neutemeljeno) prosvetiteljsko vlogo. Tiste, ki nas informirajo, namreč poleg



prekarizacije mučijo, kot to pokaže Vobičeva knjiga, tudi tehnofobija, hierarhizirani odnosi na delovnem mestu, neizpolnjenost, izgorelost, atomiziran delovni proces.

Ker sem bil vedno izrazito skeptičen do bralcev, ki so šibko točko našli v tem, da v knjigi nečesa ni, namesto da bi vzeli drugo knjigo, ki ta vidik obravnava, naj tisto, kar v knjigi manjka, ponazorim drugače. Če je knjiga deskriptivna (prednost), je lahko tudi »zgolj« demonstrativna (pomanjkljivost). Deskriptivno (pionirsko) delo na tem področju bi lahko dopolnil(i) s klasičnimi sociološkimi teorijami in koncepti. Tu se obračam na pričujočo knjigo, medtem ko dejansko (in celo v večji meri) pogledujem na naslednjo. Merim na teoretsko ustrežnejše koncepte, s katerimi bi še lažje zapopadli transformacijo novinarstva, a ki bi avtorju od opisnosti pomagali preiti k ustrezni pojasnitvi pojavov. Npr.: z Bourdieuevim konceptom polja bi dobili širšo kompleksnost prostora, h kateremu se obračata analizirana ljubljanska(!) časopisa. Obenem bi lahko tematizirali tisti pomembni tektonski premik v polju: prihod komercialne televizije, ki je s svojo *logiko* delovanja (in ne s samim prihodom) transformirala polje v celoti. Mertonov obrat Durkheimovega koncepta anomije opisuje, kako se možnost upora poveča, če aspiracije in želje ter percepcije ali ideali, v katere so posamezniki socializirani, ne ustrezajo možnostim v rigidni družbeni strukturi, s čimer bi tematizirali vlogo novinarjev v nedavnih vstajah in uporih ter tako povedali, kam z »objektivnostjo«, ko neoliberalni rezi razgalijo tvojo pozicijo inherentne notranjosti namesto odmaknjene kontemplacije zgolj-posrednika informacij. Foucault ponuja zanimiv izraz: dispozitiv, ki ga nekateri vidijo kot »ideološki aparat z vanj interpeliranim subjektom« (Melita Zajc). Transformacijo lahko zapopademo tudi z dvema koristnima konceptoma iz marksistične literature: s konceptom »akumulacije z razlašanjem« (David Harvey), reformuliranim konceptom primarne ali prvotne akumulacije, ki poudari njeno permanentnost, ki je v knjigi sicer omenjena, a ne poglobljeno tematizirana, kot privatizacija. Implikacije tega procesa so daljnosežnejše – proces je nasilno odstranil zaposlene v medijskih hišah od udeležbe v odločanju in soustvarjanju lastne hiše, od kreativnega in avtonomnega procesa ustvarjanja novic, bralcem pa začel servirati komodificirane in trivializirane informacije. Ker vidim normalizacijo *deskillinga* (str. 89) kot najpomembnejšo ugotovitev Vobičeve knjige, ki dela novinarje zamenljive in nadomestljive (str. 28) ter tako »odvečne« (Arendt), bi bilo vredno bolj poglobljeno (re)aktivirati tudi ta koncept in ugotoviti, v katerih sferah polja in katerih oddelkih medijskih hiš je ta pojav, ki spremlja vsako tehnološko revolucijo, v kapitalizmu najbolj prisoten ter kako se organizirati proti temu repetitivnemu in poneumljajočemu procesu. Npr. izraza »industrializacija« (str. 41 in 63) ali »fleksibilizacija« (str. 41) novinarjev določeni avtorji nadomestijo z izrazom »proletarizacija« (Primož Krašovec), kar prinese mnoge nove aspekte delovnega procesa. Inkorporacija vse te vednosti vsekakor ni nujna, je pa možna in zato zaželena. Zakaj? Ker je Vobič v svoji knjigi na določenih mestih, kjer sam sebi da besedo, bolj kritičen kot besedila, na katera se nanaša in s katerimi si pomaga. Tako se mi zdi na knjigo ustrezno pogledati kot na materialno realizacijo procesa napredovanja misli. Ker vede ne določa njen predmet, temveč so za prelom od prvotne in neposredne izkušnje nujni elementi, kot so epistemični horizont, metoda, s katero predmet preučujemo, in perspektiva, ki jo v raziskovanju priznamemo, vidim tudi ta družboslovni predmet kot nedokončan, kot objekt v konstantni transformaciji, ki se konsekventno dopolnjuje v opazovalčevem epistemološkem procesu. Toda primarni material v obliki ekstenzivnih intervjujev avtor že ima, in to mu je lahko pri tej nalogi v pomoč. Zdi se mi izredno pomembno, ne da bi nasilno rezali v komunikacijski krogotok produkcija–tekst–repcija in le reproducirali akademsko delitev dela, ostati pri analizi produkcije. Ne vidim pomanjkljivosti v tem, da se nekdo vzpostavi kot relevanten avtor, ki analizira produkcijski vidik kulturne industrije (če le pri tem ne izgubi pomembnosti recepcije in besedila, česar tematizacijo si lahko naloži kot nujno in refleksivno intelektualno nalogo, ki v njegovih delih ne bo vsakič prisotna, a bo kljub temu percipirana).

Na koncu še opomba. Sčasoma bo etnografsko oko treba obrniti na lastno – akademsko polje, saj to polje ustvarja kategorije novinarske percepcije skozi praktične in učenje praktič-

nih večšin (karkoli naj bi že to pomenilo), umanjka pa resnično študiozna in eruditska praksa preučevanja strukturnih in institucionalnih ozadij. Ker to presega krivdo posamezne katedre in zadeva transformacijo univerzitetnega podsistema kot takega, ne morem reči, kdo in na kateri točki v procesu edukacije novinarje preusmeri v antiintelektualizem, personalizacijo in psihologizacijo strukturnih problemov, k (m)učanju jezika, izpopolnjevanju večšin ter spoznavanju obstoječih žanrov, niti zakaj so strukturni procesi potisnjeni v ozadje. Toda dozdeva se mi, da sta škarje in platno – paradoksalno – v rokah ljudi, ki znajo o novinarstvu najbolj artikulirano pisati in govoriti.

Barbara Polajnar

**Aleš Črnič: Na vodnarjevem valu: nova religijska in duhovna gibanja.**

**Ljubljana: Založba FDV, 2012.**

**291 strani, (ISBN 978-961-235-619-4), 20 EUR**

V postindustrijski potrošniški družbi imamo posamezniki možnost izbire in »svobodnih« odločitev med serijo različnih (a konec koncev enakih) proizvodov, ki le krepijo potrošniškega duha in kapitalistično družbo, enako pa se dogaja tudi na »religijskem tržišču«, kar se tiče množice religioznih razlag sveta in obstoja, saj nismo več zaprti v tradicionalno družbo. Po drugi strani tudi vloga religije v našem življenju ni več fiksirana, ampak se vedno bolj spreminja – vsekakor je vloga religije v vsakdanjem življenju vedno bolj nejasna. Gotovo vse prej kot nejasno ali nerazumljivo, temveč nasprotno, precizno in poglobljeno Aleš Črnič v svoji drugi samostojni monografiji<sup>1</sup> *Na vodnarjevem valu: nova religijska in duhovna gibanja* podrobno analizira in raziskuje nove oblike religioznosti ter duhovnosti. Kljub temu da je *Na vodnarjevem valu* znanstveno delo, avtor piše v razumljivem jeziku, zaradi česar je knjiga dostopna širši bralski publikli. Nova religijska in duhovna gibanja se od 60. let prejšnjega stoletja dalje v Združenih državah Amerike in Zahodni Evropi (v Sloveniji od 1980. let naprej) razvijajo kot oblika upora in nestrinjanja s takratnimi ideologijami, medtem ko lahko rečemo, da so danes postala del mainstreama. S tem ko so se vpela v postindustrijsko družbo in posameznikove potrebe po sodobni religioznosti, ki se zmeraj bolj prakticira na način »verovanja brez pripadanja«, gotovo odražajo *zeitgeist* pozne kapitalistične družbe.

Tematike se Črnič loti postopoma, s temeljnimi teoretskimi razlagami, ki pojasnjujejo značilnosti, idejne izvore (azijska duhovna tradicija, zahodni ezoterizem, neopoganstvo in sodobno čarovništvo) ter tipologijo sodobnih religijskih fenomenov in konceptov v sodobni družbi. Za širše razumevanje religioloških terminov sta pomembni razlaga in diferenciacija med sektami, kulti in novimi religijskimi gibanji, ki detabuizirata posamezne religijske skupine. V nadaljevanju avtor posebno poglavje nameni novim religijskim gibanjem v odnosu z okolico in širšo družbo, kontroverzi o pranju možganov, političnim in pravnim razsežnostim novih religijskih gibanj, povezavi med novimi religijskimi gibanji in nasiljem s primeri najbolj znanih nasilnih novih religijskih gibanj (skupina Tempelj ljudstva v Jonestownu, davidovci v mestu Waco, skupina Om Šinrikjo na tokijski podzemni železnici, pripadniki Sončnega templja s skupinskim samomorom v Švici in Quebecu, Gibanje za obnovo desetih božjih zapovedi v

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1. Črničeva prva monografija nosi naslov V imenu Krišne: družboslovna študija gibanja Hare Krišna (2005), kjer avtor sistematično obravnava in analizira gibanje Hare Krišna s primerom le-tega v Sloveniji.

Ugandi ...), poda pa tudi poskuse razlag mehanizmov novoreligijskega nasilja. Pomemben je širši zaključek, da nova religijska gibanja sama po sebi niso nič bolj agresivna ali nasilna kot druge družbene oblike, pri čemer lahko dodamo, da tudi nič bolj kot t. i. tradicionalne religije, ki v imenu svoje doktrine opravičujejo in večkrat pozabljajo na pretekle masakre, ki so jih izvajale po vsem svetu. Po prikazu primerov bolj znanih novih religijskih gibanj (tistih s krščanskimi in azijskimi izvori ter izvori v sodobnih zahodnih kulturah in sodobnem satanizmu) avtor zadnje poglavje nameni predstavitvi in analizi rezultatov empirične raziskave, kjer prikazuje informacije o »alternativnih religijskih skupinah« v Sloveniji, s čimer delo prispeva svež in nov vpogled na stanje religioznosti pri nas z vidika novih religijskih in duhovnih gibanj. Terensko delo v raziskavi je bilo izvedeno med letoma 2003 in 2007,<sup>2</sup> soavtor raziskave je poleg Aleša Črniča še Gregor Lesjak. Rezultati raziskave prikazujejo, koliko novih religijskih in duhovnih gibanj je v Sloveniji, njihov izvor in čas delovanja, idejne in obredne osnove, število pripadnikov ter širše odnose teh gibanj z okolico in družbo. Posebne pozornosti vredna so izpostavljena izvorno slovenska nova religijska in duhovna gibanja oz. posamezniki, ki stojijo za njimi (Marko Pogačnik, Vesuel in Sveta družina, Sakrament Prehoda in primer predsednika Janeza Drnovška), saj bralca prek konkretnih, aktualnih in prepoznavnih praks opozorijo na netradicionalne religijske primere, ki soobstajajo v pluralnem religijskem prostoru pri nas. Na neupoštevanje enakosti raznolikih religij znotraj njihovega pluralnega okolja, ki naj bi nudilo religijsko svobodo za vse, Črnič opozori z ignoranco Urada za verske skupnosti za nekatere nove religijske skupnosti, ki so želele pridobiti status pravnih oseb. S projektom akcijskega raziskovanja se je skupina družboslovcev lotila prevetriti način delovanja pravne veje oblasti v Sloveniji in samega Urada za verske skupnosti, s postopki za ustanovitev verske skupnosti Cerkve svete pokorščine, kar jim je na koncu tudi uspelo.

Monografija *Na vodnarjevem valu* je tako pomemben prispevek v naboru družboslovne, religiološke, sociološke ali kulturološke strokovne literature, saj na enem mestu zajame obsežno tematiko novih religijskih in duhovnih gibanj, ki jih začini s primeri iz Slovenije, ter predvsem nazorno predstavi, kako so danes religijski vzorci drugačni kot nekoč. Religija izgublja primarnost in ekskluzivnost pravice razlage sveta, časi, ko je bila religija *complea mapa mundi* posameznika in ko je ekskomunikacija iz religijske pomenila izgubo smisla, so minili. Čeprav je še vedno velik del svetovnega prebivalstva tradicionalno religiozen (v smislu pripadanja velikim svetovnim religijam v tradicionalnem kontekstu), so se te oblike verovanj spremenile ter prilagodile družbenim in političnim razmeram. Religija sicer ostaja pomemben del kolektivnih imaginarijev in zgodovinskih spominov, vendar danes zavzema drugačno mesto. Življenje v postmoderni družbi je zaznamovano predvsem z globalizacijo idej in tokov; tako lahko rečemo, da se je »globalizirala« tudi religioznost. Postindutrijska potrošniška družba mnogokrat dojema posameznika kot nekakšnega umetnika svojega življenja, ki lahko racionalno izbira svojo identiteto, poslanstvo, obliko telesa, religijsko pripadnost ali samo določene prakse, kar v večini primerov paradoksalno ne vodi k večjemu zadovoljstvu, temveč nasprotno – v »uporabnikih« zgolj vzbuja občutke tesnobe in negotovosti. Posameznik je tisti, ki je najpomembnejši, zato je vsakdo lahko »bog«, in tako mora ta isti posameznik najti rešitev ali vsaj delne odgovore znotraj sebe – pri tem lahko govorimo o t. i. samoduhovnosti, ki je značilna za novodobniško duhovnost. Vse bolj postaja jasno, da ima ideja o večnem napredku, ki žene kapitalizem, omejitve. Na drugi strani izgublja moč tudi vera o vsemočnosti znanosti, ki bo pojasnila smisel bivanja. In na tem mestu kot odgovor na potrebe človeka danes, kot rešitev duhovnih komponent človeka, vstopijo nova religijska in duhovna gibanja – so namreč tipičen produkt sodobnega časa, v katerem je nastal.

2. Za nadaljnjo kontinuirano raziskavo ni bilo zagotovljenih finančnih sredstev, zaradi česar se je raziskava nadaljevala omejeno glede na časovne zmožnosti avtorjev raziskave (str. 201).

Jasmina Šepetavc

**Rosi Braidotti: *The Posthuman*. Cambridge, Malden: Polity Press, 2013  
229 strani, ISBN 978-0-7456-4157-7, 15,80 EUR**

V svoji zadnji knjigi Rosi Braidotti nadaljuje in nadgradi svoj teoretski obrat, ki ga je deloma že začela v drugi izdaji *Nomadskih subjektov* (2011, prva izdaja 1994). Kontinuiteta njenega dela je prav gotovo njena verzija feminizma, ki je vitalistična, materialistična in ukoreninjena, vplivna tudi v figuraciji postčloveka, a hkrati postčloveško označuje drugačno fazo njenega dela, ki se ne ukvarja več toliko s spolno razliko in feministično teorijo. V knjigi se vrne k enemu svojih učiteljev, Deleuzu, če ne drugače v impresivni miselni vaji risanja kartografije sodobnega postčloveškega stanja. *Posthuman* je tudi v maniri avtoričinih drugih knjig izjemno berljivo delo, sama pravi, da ga je mogoče prebrati v dveh urah (ocena ni natančna), a če stilizem pustimo ob strani: postčloveško je tema, ki je v humanistiki danes ne gre več jemati zlahka, in knjiga *The Posthuman* je v svoji sistematični preglednosti dober uvod v spoznavanje polja postčloveškega. Ključna ideja avtorice je preprosta in niti ni nova – pojem človeka/človeškega se je razpočil pod težo pritiskov sodobnih znanstvenih dognanj ter okoljskih in globalnih ekonomskih problemov – bistven in razmeroma nov pa je kvalitativni premik k postčloveškemu stanju, ki odpira resen premislek o skupnem imenovalcu naše vrste, odnosih s (človeškimi in nečloveškimi) prebivalci planeta ter naših politikah. Iz tega se razvije triada subjekt–etika–politika, ki je tudi tista rdeča nit, po kateri nas Braidottijeva vodi skozi malo manj kot 200 strani zgoščene teoretske vaje o postčloveškem.

Rosi Braidotti knjigo začne pri antihumanizmu, »eni izmed zgodovinskih in teoretskih poti, ki lahko vodijo do postčloveškega« (str. 26), tudi delu avtoričine lastne »intelektualne in osebne genealogije« (str. 16). Da je antihumanistična drža povod za ukvarjanje s posthumanizmom, nakaže že v prvih stavkih knjige, ko opozori, da »[n]ihče od nas ne more s kakršnokoli gotovostjo trditi, da smo bili vedno ljudje ali da smo samo to« in da »nekaterim ni niti zdaj priznana človeškost« (str. 1). Antihumanizem se v njeni genealogiji vzpostavlja ravno v uporih tistih, ki jim nikoli zares ni bila čisto podeljena človeškost v odnosu do Človeka humanizma, zlatega univerzalnega standarda za ocenjevanje in reguliranje vseh ostalih. Čeprav zgodbe o potrebi refleksije evrocentrizma, kolonizacije in nasilja, zatonu kartezijanskega subjekta (racionalnega moškega, Evropejca, Istosti, karkoli vas pač podžge) pa tudi nevarnem breznu vračanja k nerefektiranim postavkam še tako dobro mislečih neohumanistov (npr. Marthe Nussbaum, ki se kot figura dobrohotnega nostalgичnega konservativizma v besedilu pojavi večkrat) bralki zares ne poženejo prijetnih mravljincev teoretske novosti po telesu, pa sta bolj dobrodošla dva ključna poudarka. Prvi je epistemološka poteza Braidottijeve, da v lastni pisavi posredno vzpostavi tisto kar pridiga – njena teorija primarno izhaja iz specifične politike lokacije, ki jo jasno in brez pretenzij univerzalnega artikulira z opisovanjem intelektualne dediščine svojih poststrukturalističnih učiteljev, Pariza v 70. letih prejšnjega stoletja, velikih družbenih gibanj tistega časa, predvsem pa svojega izvora v feminizmu. Druga je premik od antihumanizma proti posthumanizmu oziroma vprašanje, kaj je tisto, kar naj bi bilo korak dlje od dekonstrukcije univerzalizma racionalnega subjekta in primata človeka. Sama zagovarja izjemno osvežujoč premik od negativnosti in antagonizmov, ki obvladujejo večino pretekle in trenutne teoretske produkcije, ne ponujajo pa pravzaprav nobenega novega produktivnega momenta, k pojmu afirmacije, v teoriji in politiki, ki bi združil »kritiko s kreativnostjo« in vključeval »koriščenje možnosti, ki jih nudi zaton enotne subjektne pozicije, ki je v humanizmu privzeta« (str. 54). Druga točka zahteva podrobnejšo elaboracijo, tudi za razumevanje njene teorije subjekta, ki ostaja prvo veliko teoretsko orodje Braidottijeve. Zanj je ključen premik, ki bi ga lahko poenostavljeno imenovali od Hegla k Spinozi. Njena monistična filozofija postajanja sloni na ideji

o eni, vitalni materiji, ki je samoorganizirajoča in inteligentna, »vključno s specifičnim kosom materije, ki je človeško utelešenje« (str. 35). Monizem zamaje dialektične opozicije v njihovih temeljih; če sprejmemo ta premik, ne moremo več govoriti o opoziciji narave in kulture, človeka in tehnologije, temveč o kontinuumu narave–kulture, ki izpodriva binarne opozicije naših starih koordinat ter odpre nove možnosti ustvarjanja afirmativnih teorij etike in politike, ki ne temeljijo na »negativnem občutku opozicijskega« in ne ciljajo nujno na »produkcijo kontra-subjektivitet« (str. 35). Razmišljanje o postčloveku/postčloveškem se torej začne pri vprašanju relacije. Relacijskost z antropomorfnimi in neantropomorfnimi elementi je šele tista, ki omogoči inteligentno samoorganizacijo, ki požene informacijske kode inteligentne materije. Subjektivnost je zanj proces samoorganizacije, ki vključuje »kompleksno in kontinuirano pogajanje z dominantnimi normami in vrednotami, pa tudi multiple odgovornosti« (str. 35).

Po Spinozi se Braidottijeva pokloni svojemu učitelju Deleuzu, ki je od začetka njenega dela, v katerem je izrazito skeptična do nekaterih njegovih pojmov (npr. kritika postajati-ženska v *Patterns of Dissonance*, 1991), pa do danes postal njen glavni teoretski vpliv, sicer v predru-gačeni obliki, čemur sama pravi teoretsko žeparstvo (vzemi in naredi za svoje). Afirmativno transformacijo zveže s subjektiviteto, tako da dobimo tri osi relacijskosti: postajati-zemlja je okoljski in trajnostni vidik postčloveškega stanja s poudarkom na ekologiji ter podnebnih spremembah, postajati-stroj zapostavi razliko med tehnologijo in človekom, postajati-žival pa govori o postantropocentričnem preobratu in transvrstni solidarnosti.

Na neki način se zdi paradokсно, da Braidottijeva v reformulaciji postčloveka še vedno vztraja pri teoriji subjekta, a njena kartografija postčloveškega zahteva hkrati nekakšno »navigacijsko orodje«. Čeprav je avtorica optimistična glede možnosti drobljenja univerzalnega subjekta in znanstvenih odkritij, ki napovedujejo postčloveško dobo, pa nikoli ni naivna. V nedavnem intervjuju za časopis *Tribuna* (2014) je navedla razloge za to vztrajanje: prvi je perverzna hitrost kanibalističnega kapitalizma, ki te z enako hitrostjo, kot proizvaja distinkcije, tudi vampirsko posrka, izbriše. Smo v procesu, ki se lahko izteče v več smeri, kapitalizem pa ima nezlomljivo strukturo, ki se spretno upogiba, ima skratka vse karte v svojih rokah. V izkoriščanju novih tehnologij, od podatkovnega rudarjenja do biogenetike, od tehnološko mediiranih vojn do okoljske degradacije, je kapitalistična struktura od vsega začetka hitrejša v prepoznavanju »kreativnih potencialov postčloveškega« (str. 45) in izrabljanju tehnološke strukture, ki je že na mestu, za pobjagovljenje vsega živega. V tej oportunistični igri vložkov in nadzora lahko nanotehnologija, biotehnologija, informacijska tehnologija in kognitivne znanosti kaj kmalu postanejo »štirje jezdec postčloveške apokalipse« (str. 59). Zato ni časa za nostalgijo, ampak je čas za gledanje naprej, pri tem pa Braidottijeva zagovarja politično subjektiviteto kot tisto, kar nam lahko pomaga pri vzpostavljanju vzdržljivih in odgovornih politik ter etike znotraj kontradikcij našega časa.

Pomembna implikacija premisleka o nehumanih vidikih thanato-kapitalizma in nekropolitike ter tega, kako se jim izogniti, se povezuje z redefinicijo življenja samega, čemur avtorica posveti celo poglavje. Na tej točki se moramo omejiti, a tu resnemu bralcu knjiga postane zanimiva: če je vsaj po Agambenu zoe del distinkcije bios/zoe obtežen s grozotami golega življenja, ki ni več človeško, Braidottijevi v okviru postčloveškega uspe prepričljiva reformulacija življenja, ki ni več lastna človeka, zoe pa se bere kot afirmativna življenjska sila. Zoe je intenzivna neosebna življenjska energija, »generativna vitalnost«, ki se nadaljuje po individualni smrti, egalitarizem, osnovan na njej, pa je »ključen za postantropocentrični preobrat: je materialističen, sekularen, ukoreninjen, nesentimentalen odgovor na oportunistično transvrstno komodifikacijo življenja, kar je logika poznega kapitalizma« (str. 60). Vitalni materializem in zoe kot ontološki motor procesov postajanja Braidottijeva ponudi kot del kreativnih možnosti zamišljanja teorije za preseganja bio- in nekropolitike, ki ga postčloveško stanje v svojih nehumanih, oportunističnih vidikih vključuje.

Verjetno najbolj aktualen del knjige je njeno vprašanje, kaj je prihodnost humanistike v 21. stoletju, ko se tradicionalni antropocentriem humanistike končuje ob zori postčloveškega. Kako vzpostaviti humanistiko, ki bo »vredna tega časa«? Braidottijeva izpostavi ključne točke: preseganje dveh kultur, interdisciplinarne discipline, odprava univerze kot administrativne strukture v prid multiverzi, to je nehierarhičnemu prostoru v mreži interakcij – z mestom in skupnostjo – ki bi general povezljivost, kreativnost, družbeno odgovornost, neodvisnost in kritično mišljenje. Nedvomno ima Rosi Braidotti prav, ko pravi, da humanistika v tej obliki ne bo preživela, in postavi v ospredje transformacijo, je pa res, da pri tem ponavlja že slišano, včasih je neprepričljiva, sploh pri svojem neomajnem verovanju v transformativne potenciale Evrope.

Ne gre zanikati, da je knjiga na trenutke izjemno znana v svojih premisah, v spomin se vsili vsaj kiborška figura Donne Haraway in njeno kasnejše delo o tovariških vrstah *How we Became Posthuman* Katherine Hayles in izbrana poglavja queer teorije. Po drugi strani pa ima Braidottijeva neponovljivo sposobnost, da bralca angažira. Kar je inspirativno, je njena metoda dela: teorija in delovanje zahtevata dva hkratna procesa, ustvarjanje kartografije, zemljevida naših lokacij in odnosov moči ter zamišljanje alternativnih figuracij, »alternativnih reprezentacij subjekta kot dinamične neenotne entitete« (str. 164). Navsezadnje poskuša oboje udejanjati skozi knjigo, bralce pa poziva k podobni pozabljeni miselni kreativnosti, afirmativni teoriji, v relacijah, z odgovornostjo in brez strahu. To je srčika postčloveškega, ki nam odpira svet v razburljive potencialnosti.

**Literatura:**

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