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Power and Principle

Walden Bello

Social Science and Democracy

Dipankar Gupta

Symposium on Care Work

Brigitte Aulenbacher, Michael Fine, Hildegard Theobald,
Yayoi Saito, Roland Atzmüller, Almut Bachinger,
Fabienne Décieux, Birgit Riegraf, Monica Budowski,
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Sociology Today

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- > Program for Social Science on a World Scale
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MAGAZINE



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> Editorial

Going Public, Going Comparative

In this issue we begin with two essays from Asia – one from the Philippines and the other from India – written by distinguished public intellectuals. Walden Bello follows a line of sociologists who have entered politics. For example, *Global Dialogue* interviewed Fernando Henrique Cardoso who became President of Brazil (GD3.4) and Nicolás Lynch who became Minister of Education in Peru (GD4.2). Bello describes the tensions and compromises involved in representing the Philippine opposition party, Akbayan, in parliament. An important writer on world development, Bello has had a long history of courageous interventions from breaking into the World Bank to discover its collaborations with the Marcos dictatorship to exposing the atrocities of the Philippine Communist Party whilst he was a member. Indian sociologist, Dipankar Gupta is another kind of public intellectual – a prolific scholar and at the same time a prominent member of major development organizations and national commissions that have brought him close to centers of power. Here he explores the close connection between democracy and social science.

We follow these disquisitions on public engagement with a symposium on one of the most pressing problems of our time, yet one sociology has been slow to investigate – the organization of care work. Put together by the indefatigable Brigitte Aulenbacher, the articles compare the marketization pressures on child and elderly care in Austria, Germany, Sweden, Japan, Spain, Australia, Chile, Costa Rica and South Africa. It is good to see ISA research committees nurturing such important comparative research.

Two essays from young scholars point to new directions in Russian sociology. The Public Sociology Laboratory in St. Petersburg challenges two prevailing conventions – the “instrumentalism” of policy research conducted at the behest of state or corporate clients and the “autonomism” of professionals who scurry into private obscurity. The Public Sociology Laboratory pursues a third road of critical engagement, building collaborations with civil society without sacrificing scientific rigor. The second Russian contribution is a photo-essay of a district of St. Petersburg that still exhibits the socialist architecture of the early Soviet era. Time is ripe for a new generation of sociologists to recover the imagination that propelled the greatest and most tragic social experiment of the 20th century.

We have three interesting contributions from the Czech Republic – a study of Czech au pairs in England, a public exhibit of Roma migration, and the dilemmas of homeschooling. We have special columns on trade unionism in China, on a comparative study of professions, and on a novel program for promoting social science on a global scale. Finally, we say a fond good-bye to José Ignacio Reguera, aka Nacho, who has been a mainstay in the ISA office for three decades, quietly taking us into the electronic age of the 21st century. At the same time we welcome the Indonesian editorial team who will produce *Global Dialogue* in a 16th language.

> **Global Dialogue can be found in 16 languages at the [ISA website](#)**

> **Submissions should be sent to burawoy@berkeley.edu**



Walden Bello, internationally renowned Filipino sociologist, reflects on the challenges and disappointments of his participation in politics, and explains why he resigned from member of parliament.



Dipankar Gupta, distinguished Indian sociologist and public intellectual, examines the connections between social science and democracy.



Brigitte Aulenbacher, a leading Austrian sociologist, assembles accounts of research into care work from around the globe.



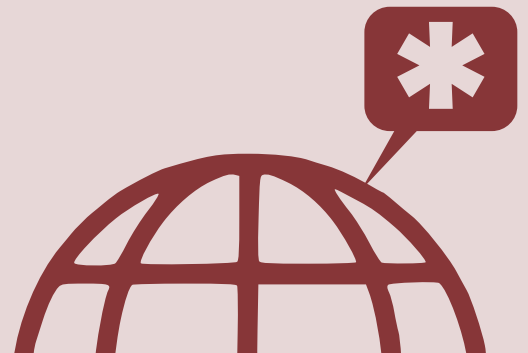
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> Power and Principle

The Vicissitudes of a Sociologist in Parliament

by **Walden Bello**, Emeritus Professor, University of the Philippines at Diliman, and former member of the Philippine House of Representatives, 2009-15



Walden Bello is a Filipino sociologist of immense international stature as a scholar and public intellectual. He has published major books on development and politics, including *The Anti-Development State* (2004), *Food Wars* (2009) and most recently *Capitalism's Last Stand? Deglobalization in the Age of Austerity* (2013). Apart from being professor at the University of the Philippines, he directed the US-based *Institute for Food and Development Policy (Food First)* (1990-94) and was the founding director of the Bangkok-based institute, *Focus on the Global South*. He is a regular contributor to newspaper columns all over the world and has been the recipient of many international awards, including the *Right Livelihood Prize* (aka the *Alternative Nobel Prize*) and the *Outstanding Public Scholar Award* of the *International Studies Association*. Here he describes his experiences and dilemmas as a sociologist in politics – the principal representative of the Filipino opposition party, *Akbayan*, in the Philippine House of Representatives. Professor Bello was a plenary speaker at the *ISA World Congress of Sociology* in Yokohama (July 2014). An extended version of this article can be found at *Global Express*¹.

Walden Bello.

For most of my life, I have been both a sociologist and an activist. In 1975, with a newly-minted Princeton PhD in sociology, I plunged into full-time activism, first to overthrow the Marcos dictatorship in the Philippines as a member of the underground National Democratic Front's international wing, then as a militant against corporate-driven globalization. From 1994 to 2009, I taught sociology at the University of the Philippines at Diliman; in 2009, I became a legislator for a progressive political party in the House of Representatives of the Philippines.

The party to which I belong, Akbayan, forged a progressive identity from 1998 to 2009, expressing its crusading spirit through congressional proposals including the Reproductive Health Bill, agrarian reform efforts, initiatives to end discrimination against the LGBT community, extension of absentee voting rights to Filipinos overseas, promotion of workers' security, and introduction of socialized housing for the urban poor.

In 2009, the party debated whether to support the Liberal Party (LP) candidate in the 2010 presidential elections – a question that turned on whether the candidate could be relied on to carry out a reform program. While the Liberal candidate would probably not promote wealth redistribution, participatory democracy, or defense of national sovereignty, most Akbayan supporters believed the Liberals would support good governance or anti-corruption – an overriding demand, given the corrosive effects of corruption on our democracy.

But while the LP's anti-corruption agenda was decisive, we also expected an LP candidate would look favorably on other parts of our agenda, notably reproductive health and agrarian reform. By 2010, the long-controversial Reproductive Health Bill had moved to the center of congressional debate, while a recently passed agrarian reform law – again one of my party's main concerns – awaited implementation; moreover, we expected to be able to push other key issues, including an independent foreign policy; repeal of the automatic appropriations act that prioritizes the servicing of foreign and domestic debt; and the elimination of neoliberal measures in trade, finance, and investment.

The LP candidate Benigno Simeon Aquino III (son of iconic former President Corazon Aquino and martyred Benigno Aquino) was elected President in 2010. Over the next five years, as Akbayan's principal representative in the House, I gained first-hand experience of the opportunities and constraints that participation in a coalition dominated by liberals and traditional politicians offers a progressive party.

> Winning on the Cultural Front

Filipino progressives have long sought a government-supported family planning program, to address both pov-

erty and women's reproductive health. By 2010, when the new administration came into office, my party and other progressives had kept the Reproductive Health Bill on the legislative agenda for twelve years. Despite fierce opposition from the powerful Roman Catholic Church, progressives had built a multiclass alliance, reframing the issue in terms of women's reproductive rights and health. It was a winning argument, deployed with skill not only at a rational level, but also symbolically through the strategic dissemination of images of an all-male hierarchy and a predominantly male Congress controlling women's choices. By 2012, we had successfully driven a wedge between a conservative ideological institution and part of the ruling elite and the middle class normally under its sway, and the Bill became law.

> Agrarian Reform: The Hard Realities of Class

Agrarian reform, however, illustrates the difficulties of coalition politics, especially around issues touching on class interests. Although land reform efforts date back to the early 1960s in the Philippines, vast inequalities persist. In the 1970s, the Marcos dictatorship's land reform program faced landlord resistance; it was placed on hold. After Marcos' overthrow in 1986, President Corazon Aquino's administration launched an ambitious project to redistribute some 10.3 million hectares, partly in response to the New People's Army's rural insurgency. However, a landlord-dominated Congress attached loopholes to the law, effectively limiting redistribution efforts to public land – leaving *the most productive* privately-owned land untouched.

In my first year in Congress, Akbayan successfully co-sponsored a new agrarian reform law (CARPER), providing sufficient funds for land acquisition and plugging legal loopholes. The bill passed because the number of large landlords in Congress had significantly decreased, while a popular movement for agrarian justice had come back to life, electrified by a band of peasants, who marched 1,700 kilometers, from the island of Mindanao to the presidential palace.

Yet even if a strong law is passed, political will is required for its implementation. Since the law's passage, presidential neglect and an unwillingness to confront landlords have left untouched some 700,000 eligible hectares – mostly private, including some of the country's best agricultural lands. Agrarian reform has ground to a halt, stymied by landlord resistance, presidential neglect, and bureaucratic timidity. The reformist President's refusal to dismiss the timid, incompetent official in charge of land reform, along with the President's nonchalant attitude toward this reform, was one of the factors behind my resignation in March 2015.

> The Good Governance Debacle

Let me finally turn to my party's experience in advocating for good governance. The promise that a Liberal Party ad-

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ministration would be serious about addressing corruption was the main reason Akbayan joined the reform coalition in 2010. Five years later, it was this issue that prompted my resignation.

The first years of the Aquino administration were marked by a campaign for good governance. As Akbayan's principal representative in Congress, it was exhilarating to be part of this reform push, including the prosecution of the former president, Gloria Macapagal Arroyo, for widespread corruption. The May 2013 elections were interpreted by many, including myself, as a vote of confidence in the Liberal administration.

But the honeymoon did not last. The Philippine political system has an institution called the "pork barrel" or "Priority Development Assistance Fund" (PDAF) inherited from the US colonial period whereby the President allocates a specified sum to each member of Congress to use for projects in his or her constituency. Soon afterwards, we learned that a skilled political operative, Janet Lim-Napoles, had set up fake organizations through which legislators could channel PDAF funds meant for development projects and social services to themselves, with Napoles taking a cut for her services. The "Napoles scam" provoked widespread revulsion and many calls to eliminate PDAF. I strongly believed that my party should have stuck to its principles, joined the call to abolish PDAF, and refused to avail itself of the sums allocated for the party by the President – but to my consternation, my proposal was roundly trounced during a leadership meeting.

Soon, another scandal erupted over a multibillion peso secret presidential slush fund, the Disbursement Acceleration Program. With the non-transparent, unaccountable, reckless manipulation of public funds, the administration was engaged in the same sort of behavior it had accused the previous administration of. When the Supreme Court ruled the program unconstitutional, it was time, I felt, for the President to take decisive action.

When I called on my party to ask the President to demand resignations of the responsible officials, however, some fellow party members disagreed, saying it would only make the President more stubborn – a fatalistic response I considered unworthy of a progressive party. Getting nowhere with the party leadership, I wrote to the President directly, arguing as a concerned citizen that the President should fire the Budget Secretary because of "his fast and loose manipulation of funds, with no sense of limits." The program, I wrote, created "precisely the kind of presidential patronage subversive of the separation of powers the Constitution wanted to avert" by giving the Executive Branch direct financial clout over members of the Senate and the House.

My letter raised tensions within the Akbayan leadership: most members argued that I had no right to write the Pres-

ident as an individual. Subordinating my personal views to the party position was the price, I was told, of being the party's most high-profile representative.

As our internal party debates continued, the administration experienced a second debacle: on January 25, 2015, an anti-terrorist mission in Mindanao went awry, resulting in the death of 44 members of the National Police's Special Action Force – along with eighteen militants of the separatist Moro Islamic Liberation Front, with which the government was then negotiating a tentative autonomy agreement.

The "Mamasapano raid" exemplified bad governance on three counts. First, the President refused to take responsibility for an operation he had ordered, violating a basic tenet of presidential leadership. Second, he illegally gave command of the operation to a crony in the leadership of the national police who had been suspended on charges of corruption by the country's Ombudsman. Third, he ordered a mission reflecting American priorities, not those of the Philippines – knowing that a mishap would undermine crucial peace negotiations. In the name of good governance, I demanded that the President take full responsibility for the fiasco and reveal all dimensions of the raid, especially the role of the United States.

As the administration's crisis of authority mounted, I asked Akbayan to push for reform. With the President in a weakened moral position, I argued, we should pressure him not only to accept responsibility for the tragic raid, but also to dismiss corrupt, inept, and reckless officials, reinvigorating the tattered good governance program. The party leadership refused.

Unable to support a President who refused to take responsibility for the tragedy and who continued to shelter corrupt and inept cronies, my resignation as Akbayan's representative in the House of Representatives was inevitable. Convinced as I was that the party leadership was wrong, I also realized I could no longer serve as the party's representative if I could not agree with a basic party position, such as its continuing support for the President. No one personally asked me to resign, but the party's code of conduct was clear: I resigned on March 19, 2015.

> Key Lessons

Through this narrative, I have highlighted the lessons I draw from the pursuit of three advocacies: reproductive health, agrarian reform, and good governance.

The reproductive health struggle illustrates the way cultural issues provide an arena where the progressive agenda can be advanced through careful alliance-building and discursive strategies. In the fight for family planning, the pro-reproductive health forces were able to create splits in the upper and middle classes, by replacing the narrative of

population control with a discourse on women's reproductive rights, creating space for the passage of the law in spite of fanatical opposition.

The agrarian reform experience reminds us how difficult it is to win direct assaults on the structures of inequality in a non-revolutionary political climate. Although progressive forces managed to forge powerful legislation, the structures of agrarian inequality remain strong, owing to a combination of presidential neglect, bureaucratic timidity, and landlord resistance.

The third example, the struggle for good governance, offers a trove of lessons, though it exacted painful personal and political consequences. One lesson is that coalitions are dynamic: in this case, an alliance for reform may have evolved into something different. A second is that a progressive party must continually assess its participation in coalitions. Any party has interests – including administrative positions or influence within a coalition – but at times, those interests may conflict with fundamental values. At

such critical junctures, a party of the left must ensure that values prevail if it is to maintain its integrity.

A third lesson: on occasion, serious differences of opinion may emerge between parties and their parliamentary representatives. At such points, progressives must follow their conscience, even if it means opposing the leadership of their own party. Being a progressive means envisioning a society organized around equality, justice, solidarity, and sovereignty – and having a political program to realize this vision. But it also means projecting an ethical, moral stance. Perhaps the distinguishing mark of true progressives holding public office is their ethical behavior. For me, being a progressive in the corridors of power means, above all, holding onto one's principles and values, even if this means losing one's position, possessions, or life. ■

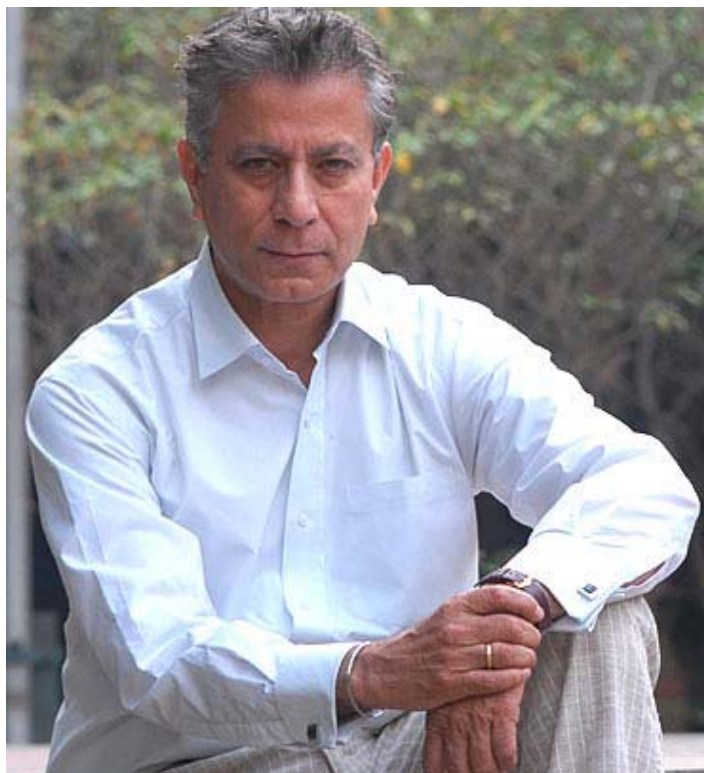
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¹ <http://isa-global-dialogue.net/power-and-principle-the-vicissitudes-of-a-sociologist-in-parliament-july-4-2015/>

> Social Science and Democracy

An Elective Affinity

by **Dipankar Gupta**, Shiv Nadar University, New Delhi, India¹



| Dipankar Gupta.

Dipankar Gupta is a distinguished Indian sociologist and leading public intellectual. He is Professor and Director of the Centre for Public Affairs and Critical Theory at the Shiv Nadar University in New Delhi. For nearly three decades he taught sociology at Jawaharlal Nehru University. The author and editor of eighteen books, he has written on a vast array of topics related to India's postcolonial transformation. His most recent book, *Revolution from Above: India's Future and the Citizen Elite*, argues that democracy advances through interventions from above. He is a regular columnist for *The Times of India* and *The Hindu* and is involved in public affairs through participation in various institutions, including directorships of the Reserve Bank of India and of the National Bank for Agriculture and Rural Development. He has been a visiting Professor in Toronto, Paris, and London as well as a senior fellow in various universities in the US. The recipient of many honors, in 2010 he was awarded the Chevalier of the Order of Arts and Letters by the French Government. A fuller version of this article can be found at *Global Express*².

Ever wonder why social sciences, including philosophy, flourish only in democratic societies? Some of the world's richest countries – Saudi Arabia, China, and Russia, for example – have made great strides in the natural sciences, but the social sciences are in miserable shape. China and Russia can match advances in electronics, physics, medicine, transportation, with the best, but bring in sociology, political science, economics, even history, and these countries falter. Is it only in democracies that social sciences are actively pursued? And, if so, why?

Some have argued that an apparent affinity between democracy and the social sciences masks a more superficial prejudice – that the apparent connection is actually a product of a specific Western culture. Perhaps the so-

cial sciences only appear to be culturally neutral when, in fact, they are confined to European or American concerns? Many non-Western critics of social sciences promote indigenous categories, as a corrective that also exposes the universalistic pretensions of the social sciences. But this approach forgets that the social sciences have developed only recently, even in Europe and America. Once, these knowledge systems were novel in those parts of the world as well, drawing none of their analytical powers from medieval, or even late medieval, Europe.

Before democracy, the context for the pursuit of social sciences did not exist. Nor were the kinds of data – staple items in modern sociology, political science, and economics – available. Social sciences were born when a new context emerged, and when a new set of facts became

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relevant – a twin thrust that together propelled the growth of the social sciences.

As long as knowledge consisted of beliefs handed down from above, whether church or state, secularism was out of the question, waiting in the wings until the individual could ask: “Before I believe what you say, prove it to me.” For the social sciences, secularism is key, because we study people in action. Lives do not remain static because contexts differ across the globe and in history. The natural sciences have more leeway: Water always quenches thirst, rainbow arcs the sky and fire brings both smoke and light. None of these require democracy, nor have they changed since its arrival. The social sciences are different.

For the social sciences, it is relevant – no, essential – to frame observations with the understanding that what others do impacts the self, even defines it. This aspect, so central today, did not hold valency or weight in the past. In earlier times, communities, groups, solidarities, tribes, castes, affines and blood relatives, lived within their confines, but we had no *society*. Wide-ranging, regular interactions across primordial frontiers – the subject of social scientific inquiry – arrived only recently in human history. With the coming of society, it is no longer possible to remain tightly bound within pre-existing groups: the awareness of the “other” becomes pivotal to the constitution of even one’s self.

In democracy, this awareness becomes all the more significant. Policies or economic initiative must consider multiple interests, even those of the less privileged. Britain’s 1834 Poor Law Amendment Act, for example, was a major step in establishing democracy: it meant that labor would no longer be confined to parish-run poor houses, but could move freely in search of jobs.

Democracy surfaced a new, grand fact. From its inception, we began to accept human beings as rational goal-seeking actors, free to choose their path. With choices we are also liable to make errors – a welcome price to pay, for it is only when one is unafraid of making errors that innovative things happen.

What does this imply? When individual errors are not penalized, there is scope both for improvement and innovation. If democracy’s laws are not violated, errors that respect its boundaries are welcome. Democracy allows many routes: different ways of raising children, leading a married life, choosing jobs and professions, making friends. In the past, these choices did not exist; but in democracy, even those who find it difficult to break with traditional prejudices are constrained to restrain primordial instincts.

It is this thicket of trial-and-error that constitutes the empirical material of the social sciences. Making a mistake may be unfortunate from a personal point of view,

but for the social sciences, errors are fundamental, giving social scientists both their data and their concepts. Democracy is the necessary condition for the emergence of social sciences, for it is only then that acceptance of errors becomes unexceptional.

Imagine yourself an economist in a pre-democratic society. For all practical purposes, the market was known, and buyers and sellers of commodities and services were pre-fixed and tagged from the start. Medieval “karkhanas” [workshops] produced for a defined category of buyers; skills were needed, but not enterprise. Nor was it possible to make an “economic” error; risk-taking did not arise, because buying and selling were shaped by custom or patronage. When land was not easily alienable, nor labor free to move around, status was defined from the start, which is why economics as a scholarly discipline had no place in pre-democratic times. There was no “hidden hand,” no market disequilibrium, no errors of judgment that led to economic swings and bankruptcy.

In a context where multiple interests interact, however, a democracy must eventually conduct its economy with sensitivity. While the market’s hidden hand operates, occasionally the state’s exposed hand is necessary to maintain social equilibrium. If government gives in to the interests of one class or the other, it takes that much longer for a hurt economy to heal – a pattern that reveals how central to democracy are the awareness of others, cross-cutting interests, and the admissibility of errors.

Economics as a discipline would not have a leg to stand on if it were not for the basic principle that people make mistakes. Is it time for quantitative easing? Should the exchange rate be pegged at a certain level? In totalitarian economies, the scope for such inquiries is severely restricted because decisions are taken from above. In democracies, we can insist “prove it.”

Similarly, by separating power from authority, political science underlines its dependence on democracy. In the past, rulers had power, but authority comes only with popular mandate, freely exercised. With democracy, other people count. Democracy accepts the multiplicity of interests in society as a necessary condition; conflicting views and goals must be expressed within a framework of free and fair elections, for no matter which party wields authority, it does so not in the name of God, or King, but People. In order to succeed, any authority-seeker must balance conflicting interests – agriculturists, industrial laborers, the white-collar class, and so on. And all these fractions have sub-fractions, compelling those in politics to pay attention to “others.”

For political science, it is imperative that the system allows people to make and unmake mistakes – always within a set of rules. Make mistakes, and you lose power. In a

democracy, those in authority cannot take their elevation for granted: voters can change their minds, and are even encouraged to do so. Without democracy, there are no choices, no elections, no recanting and no anti-incumbency factor.

What of sociology, a discipline whose primary objective is to refract phenomena through classes, categories, genders, occupational groups? Social practices such as marriage are examined in terms of actual practice, or through different lenses, exploring the effects of caste, class, religion, occupation – a style of inquiry that starts from awareness of “others.”

Resisting popular conceptions of reality, or, more specifically, essentialism, sociology self-consciously digs deep into the comparative method, exploring variations over time as well as space, forcing the scholar to be dispassionate and critical. Through comparative studies we explore the general features of a social phenomenon, whether religion, marriage or social preference – as well as understand how social facts may manifest differently, depending on their setting.

Thus, sociology’s link with democracy is easy to understand: in the awareness of “others,” of context, this discipline defines itself, focusing on how people interact within and across cultural borders and economic boundaries. It is this attribute of deliberate refraction that lets sociology be a pacesetter in several areas, notably the study of social mobility.

In non-democratic settings, where is the freedom to ask those questions? Without the freedom that democracy allows, any enquiry along these lines would be labeled subversive. A democracy, by contrast, takes nourishment from such investigations, because all aspirants to authority compete, and it gauges how best to represent multiple interests.

Sociology can seem activist, or prompted by policy makers’ immediate interests. This is a misreading of the discipline, but it is also true that democratic politicians can profit from sociology: if policy makers want a complete picture of a problem, they can turn to sociology.

Yet when sociologists work at the behest of activists, they risk tainting their data to suit non-academic interests. Sociology is best suited to ask about the direction of change in a holistic fashion – often generating red-hot contesta-

tions, often obscuring the wider view. But sociology can also help, by plotting out paths towards a more inclusive society – producing greater participation, and greater tolerance of differences and errors. At the very heart of sociology, rests the proposition that people make errors, but that they also try to correct them, pursuing goals through means not pre-determined.

Similar arguments hold for history and philosophy. History, properly speaking, is an obsession with the present; we look at the past from the vantage point of our finite lifetimes. In democracies, scrutiny of bygone periods allows us to accept flaws of the past, while recognizing how earlier epochs influence the present. Without this, history remains a colorless chronicle, or a colorful hagiography – in both cases academically useless.

Philosophy, likewise, was transformed by the advent of democracy. The “self” which, in isolation, ruled Western philosophy from Descartes to Kant, has had to make room for the “other” – a transformation which should not be read as accommodative, but rather as constitutive, because philosophy today clearly admits that there really is no self without the other. If democracy signifies a concern for “others” and allows for errors, we are really talking about “citizenship” – ethics writ large, the corner stone of democratic law and governance. Democratic constitutions and penal codes are premised on accepting “others” as ethical agents, ontologically similar to ourselves, complements of our being.

When the “other” becomes so central, and when the acceptance of “errors” is routine, we are actually talking about citizenship; social scientists try to strengthen citizenship, for in doing so they consolidate their respective disciplines. The strength of a democracy can be judged from the strength and depth of its social sciences. Freedom of choice, the openness towards “errors” and the realization that others impact the self, are conditions available only to citizens in democracies. Consequently, the social sciences cannot be characterized as Western or Eurocentric. If anything, they should be seen as citizen-centric, perhaps even citizenric, disciplines. ■

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¹ I am grateful to Professor André Béteille and to Professor Deepak Mehta for comments.

² <http://isa-global-dialogue.net/social-science-and-democracy-an-elective-affinity/>

> Global Perspectives on Care Work

by **Brigitte Aulenbacher**, Johannes Kepler University, Linz, Austria and member of ISA Research Committees on Economy and Society (RC02), Poverty, Social Welfare and Social Policy (RC19), Sociology of Work (RC30), and Women in Society (RC32) and Vice-Chair of the Local Organizing Committee of the Third ISA Forum of Sociology, Vienna 2016



| Illustration by Arbu.

For some years now, however, sociological interest in care and care work has been on the rise: the theme is fast moving up the sociological research agenda, and sociologists are increasingly exploring the social differences and inequalities involved in care and persistent care gaps.

> Crises of Care and Global Care Deficits

In the sociologies of high- and middle-income countries of the Global North, this new interest in care and care work reflects processes that began in the 1980s and 1990s, including the implementation of New Public Management in OECD countries and the commodification of care, as well as the ongoing challenges of providing care in everyday life.

On the one hand, new so-called care industries are evolving and private households increasingly employ migrant workers from the Global South and East. On the other hand, as welfare states shrink in South and Eastern Europe as well as in Western

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Care and care work, self-care and care for others, in everyday life and across the life course, by family and kin, and by care professionals, in the market and provided by the state or civil society: all these are fundamental for individuals and for

social cohesion. Yet despite a long tradition of research on care, the issue has been marginalized – perhaps because care is often invisible in the so-called private sphere and devalued in the public sphere, especially within the framework of a gendered and ethnic division of labor.

Europe, post-2008 fiscal austerity is creating new crises of care – crises that have often been overlooked, since care and care work have always been subordinated and neglected issues of social reproduction.

But in the middle-income countries of the Global South, as economic growth has in the last decade been accompanied by an expansion of new social programs and a welfare state, care and care work have been strengthened as a public sector service for the poor, children, elderly or disabled people, and has increasingly been extended to other parts of the population.

Current sociological research on care and care work reflects these developments, and the following articles in *Global Dialogue* provide some insights into the care regimes of several countries in the Global North and South.

> Care Regimes in the Global North and South

Taking us around the globe, the following articles compare different care regimes, focusing on the interplay of (private) households, family and kin, civil society, states and markets in a number of countries. Together, the articles offer four key insights into contemporary care regimes. First, they reveal a general tendency of ongoing marketization. Second, they outline a

complex interplay between commodification and decommodification of care. Third, they show how the commodification of care not only makes a difference in the organization of care work, but also raises questions about who provides and who receives care. Finally, the articles show the importance of examining local, national and trans- and international contexts for understanding important trends in care and care work.

In his contribution, Michael D. Fine describes how Australia's care regime is being reorganized between marketization and state provision of care. The tasks and working conditions of care givers, as well as the concept of the care recipient as a customer, are undergoing fundamental changes, oscillating between professionalization and de-professionalization. Hildegard Theobald's and Yayoi Saito's description of the Swedish and Japanese care regimes shows how national policies transfer and adapt ideas of care and how they relate to the division of labor. Despite divergences between these two care regimes, professional long-term care in both countries seems to be threatened by policies which weaken public care provision.

Roland Atzmüller, Brigitte Aulenbacher, Almut Bachinger, Fabienne Décieux and Birgit Riegraf present their findings about Austria's and Germany's pathway from welfare state

to investment state, depicting care as a contested terrain, and shaping migrant work in the household, professional care, social protests and alternative care concepts. Monica Budowski, Sebastian Schief and Daniel Vera present a comparison of care regimes in Chile, Costa Rica and Spain, and show how child care arrangements and the division of labor between men and women in economically precarious households are shaped by welfare states' orientation to the market, the family or the state as key care providers. Elena Moore and Jeremy Seekings reconstruct the history of South Africa's welfare state, emphasizing the historical shift from apartheid to a post-apartheid regime. Facing problems such as AIDS and orphanhood and focusing on the elderly and children, the state is central to care provision, but the family, kin, and, recently the market, are also important components of South Africa's contemporary care regime. In short, the articles point to the divergent contexts and consequences of the increasing commodification of care in very different countries.¹ ■

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¹ For these and further insights on care and care work from around the world see the special issue: *Soziale Welt* (Sonderband 20), "Sorge: Arbeit, Verhältnisse, Regime" [Care: Work, Relations, Regimes], 2014 (edited by Brigitte Aulenbacher, Birgit Riegraf, and Hildegard Theobald).

> Reconstructing Care as a Market in Australia

by **Michael D. Fine**, Macquarie University, Sydney, Australia and member of ISA Research Committee on Sociology of Aging (RC11)

Alongside a significant non-profit sector in childcare, services may be bought and sold as a profit-making business in Australia.

Walzing Matilda is a deceptively cheerful song about a homeless swaggie who carries his bedding around (walzes his matilda) as he searches for work across the Australian outback. Internationally recognizable as Australian, it typifies the itinerant lifestyle that serviced the industrial scale sheep farming that dominated this country's economy in the late nineteenth century. Another of Australia's greatest folk songs from the same period, *Past Carin'*, could become the theme for the new era, as restructured and marketized care provisions increasingly shape the support provided to those who need personal assistance

on a daily basis. In the words of the Henry Lawson poem on which the song is based:

*Past wearyin' or carin',
Past feelin' and despairin';
And now I only wish to be
Beyond all signs of carin'.*

Successive Australian governments, both Labor and Liberal-National, have sought public support by claiming to expand and develop programs of social care. But in this era of neoliberalism and fiscal austerity, they have drawn from a new template for growth in which public and non-profit services are constrained, while the market for services is promoted. Service users are recast as "consumers," required to pay from their own pockets wherever possible.

> Care: Developing a Sociological Diagnosis

We know that care is essential across the human life course. Yet an understanding of care remains a disciplinary blind spot. From even the most basic international or cross-cultural comparison, it is clear that the way that care is organized reflects the inner workings of society. Analyzing care thus provides a powerful social diagnostic tool, a way to understand the social relationships of the most vulnerable, as well as social structures and systems of power.

Although women have commonly been expected to provide care, unpaid, within the family, the importance of care beyond the family has grown massively over the 20th century. As the employment of women outside the home has increased, so has the demand for care outside the family. Governments in Australia, as elsewhere, have been forced to respond by providing access to formal, paid care.

Despite challenging economic conditions, Australia has significantly expanded formal care provisions, a shift which has been accompanied by significant changes in the organization, funding, and provision of care. These changes cover a number of relatively specialized fields, from the management of infancy and child care, through disability support, to aged care. Although each sector of care has specific features, these specificities should not obscure the larger transformation, or the common elements which underlie both demands for action and the response by government and market.

> Reforms in Aged and Disability Care

Changes in care for Australia's aged have been shaped by efforts to respond to the needs of an aging population while containing public costs. The changes build on some 50 years of expansion and reform in aged care, but are also intended to fundamentally transform key elements of the system, with higher fees for all types and levels of service. There is increasing reliance on market principles and encouragement for private for-profit providers to take an even greater role in the provision of services.

Unlike the earlier program, the new Home Support Program is fully national, with little variation across Australia's states.

Australia's disability care reforms, too, introduce a national program, responding to increasing numbers of people with disabilities needing care, as well as to humanitarian concerns about the rather uneven and inadequate services previously provided by some state jurisdictions.

As in the reformed program of aged care, individualized payments – known as the Consumer-Directed Care approach – give service recipients control of their own funds to purchase services, a reform that is especially attractive to people with disabilities, and to parent carers of adult children with intellectual disabilities who still remain dependent on family care – typically their mother, or frail aged parents.

In both programs, replacing services with cash payments is intended to develop a service market and promote for-profit provision. It will also entrench casual employment, with considerable impact on the work conditions of employees and on public and non-profit services.

> Taking Care of Children

Australia was arguably the first English-speaking country to develop a national program of child care services in the 1970s and 1980s. Service providers were initially all non-profit, but for-profit providers were introduced in the 1990s. The funding system, a limited form of means-tested subsidy and regulation, failed to expand to keep up with rising fees, and many families have been unable to obtain child care. Reforms introduced by the current Liberal-led government will redistribute existing funds and increase provision, but will also tie subsidies tightly to maternal employment.

Each of the programs described above replaces family-based care

with paid formal services. An alternative approach, used in every OECD country but the USA, would allow for publicly-funded paid parental leave. A national program was finally introduced in Australia in 2011, but was pared down after only a few years, with the introduction of new conditions restricting eligibility and excluding employees who have access to work-related benefits.

> Challenges for the New Care Template

Early welfare programs responded to families' limited capacity to meet increasing needs for care, and the failure of markets to respond. Today, politicians seek to create an alternative system, based on a regulated, state-promoted market for care. The different regulated markets emerging in Australia promise to reduce government's direct costs by replacing public funding with means-tested payments by families, and by "efficiencies" resulting from low-cost provision by for-profit providers. But while this approach holds some attraction by offering recipients increased "choice," it also poses significant problems of security, both for recipients of care and for service staff, many of whom face reduced working conditions and loss of career prospects.

For sociologists, the challenge is also considerable. To go beyond theory, we must also understand the workings of these new care systems, while documenting and analyzing the consequences for care-giving, for payment, for loyalty and motivation of these different modes, for personal and family-based intimacy, on the one hand, and for paid employment on the other. ■

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> Long-Term Care: Sweden and Japan Compared

by **Hildegard Theobald**, University of Vechta, Germany and member of ISA Research Committees on Aging (RC11) and Poverty, Social Welfare and Social Policy (RC19) and **Yayoi Saito**, Osaka University, Japan



Active aging in Japan.
Photo by Pia Kieninger.

Since the 1980s, long-term care policies in many Western countries have been considerably restructured, with strong impact on both care users and care workers. Countries have often borrowed policy approaches from one another. Although long-term care programs in Sweden and Japan were established within the framework of different welfare systems and ideas of family responsibilities, the Swedish approach to long-term care played a significant role in the development of long-term care policies in Japan.

In Sweden, as early as the 1960s a universal public service model oriented towards social care for elderly people was gradually expanded on a municipal level. It was, then, formally regulated by a national Law on Social Service in 1982. The law stipulates a general right to assistance, giv-

ing local authorities the responsibility of ensuring that care needs are met, although the law lacks detailed regulations on eligibility or specific services. Since the 1980s, fiscal constraints and demographic changes have meant that coverage of public services has gradually declined as they were increasingly targeted to those with greatest needs. In 2012, 9% of those 65 years or older used public home care services, while 5% lived in residential care facilities. However, from an international perspective, the range of delivered services remains comparatively high, and private co-payments only cover about 5% of total care costs.

In Japan, public services to help older adults at home were also introduced in the 1960s, although these services were limited to elderly people living alone, and the program was means-tested. An emphasis on family responsibility

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and restrictive social rights limited home help services. Since 1989, however, a “Ten-Year Strategy of Promoting Health Care and Welfare for the Aged” (the Gold Plan) gave tax-based home help services on the municipal level, following the Swedish local public service model. However, difficulties in expanding home help services, limited municipal resources and the more critical stance of the Japanese population towards tax increases, contributed to the introduction of universal Long-Term Care Insurance (LTCl) in 2000, with a mix of tax- and social insurance financing. Within the framework of LTCl, the program granted residential care- and home help services for older adults with severe but also minor needs. This increased the number of beneficiaries considerably. In 2011, almost 13% of adults aged 65 or higher received long-term care services, with 4.4% using home help services, 5.4% attending day care centers, and 3% living in residential care facilities. In April 2015, a new reform seeks to target public support to older adults with more severe care needs; this reformed program increases co-payments from 10 to 20% of costs for higher-income elderly.

Although service provision has been marketized in both Sweden and Japan, it is still publicly funded. Sweden’s already well-established public residential and home-based care infrastructure was opened up for private non- or for-profit providers in the 1990s. Initially, marketization was based on outsourcing public care provision to mainly for-profit providers based on competition, but today, customer choice models are more common on the municipal level. In these programs, municipalities register different public and private providers, and beneficiaries may choose their provider. By 2012, about 20% of home care and residential care was in the hands of for-profit providers run by big chains.

In Japan, the LTCl opened up a market in home care, organized through competition between public, for-profit

and non-profit providers, in other words a model based on customer choice. Residential care services, however, are still provided either by public or non-profit organizations. The municipalities run the system, securing finance via LTCl and tax financing, while the prefectures authorize care providers and additional tax financing. With the expansion of home help service providers due to the introduction of universal LTCl, the share of for-profit providers increased from 30% in 2000 to 63% in 2012.

With these shifts in public support, the (non-)expansion of care infrastructure and market-oriented reforms, the situation of care workers has changed significantly, especially for those employed by home help service providers. A recent inquiry into the conditions of home helpers in both countries revealed high levels of standardization of care work and high workloads. In both countries, home helpers report that their tasks are almost all decided beforehand within high-pressure scheduling, but they assess this restructuring against the background of country-specific developments. In Sweden, the gradual decline of public long-term care support, market-oriented restructuring of the existing care infrastructure together with narrow time-frames for care provision, contravene prevalent norms, leading to strong criticism by care workers. In Japan, care workers have not regarded similar developments so negatively, because the expansion of care services and public support occurred at the same time as market-oriented restructuring. However, in both countries, more than 40% of care workers are considering quitting their jobs, revealing their dissatisfaction with working conditions. In Japan, dissatisfaction mainly stems from heavy care burdens and low wages, while in Sweden programmatic changes have clearly been at the source of worker discontent. ■

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> The Changing Face of Care Work in Austria and Germany

by **Roland Atzmüller**, Johannes Kepler University Linz, Austria and member of ISA Research Committee on Poverty, Social Welfare and Social Policy (RC19); **Brigitte Aulenbacher**, Johannes Kepler University, Linz, Austria and member of ISA Research Committees on Economy and Society (RC02), RC19, Sociology of Work (RC30), and Women in Society (RC32) and Vice-Chair of the Local Organizing Committee of the Third ISA Forum of Sociology, Vienna 2016; **Almut Bachinger**, International Centre for Migration Policy Development, Vienna, Austria; **Fabienne Décieux**, Johannes Kepler University Linz, Austria; **Birgit Riegraf**, University of Paderborn, Germany and member of RC02, RC19, RC30, and RC32



*A typical situation in an Austrian kindergarten.
Photo by Arbeiterkammer Oberösterreich,
Austria.*

Austria and Germany, two economically powerful Western European countries on the border with Eastern Europe, are regarded as conservative welfare states currently undergoing fundamental processes of re-

organization. Both face rising demands, obligations and costs in the domain of care and care work, especially in elder care and child care; both meet these obligations in private households and in professional domains.



May 1st – Day of Invisible Labor! Statue of popular German actress, Ida Schumacher, dressed to symbolize invisible work. Photo by Birgit Erbe.

> The Exploitation of Migrant Workers

Most care in Germany and Austria is provided for free in families, mainly by women. Although women's increasing labor-market participation and alternative forms of living mean the family no longer assumes a fixed structure, governmental cash-for-care policies aim to maintain it through monetary incentives and tax advantages. In Germany and Austria, as in other countries, migrant women are often employed for the three Cs: cleaning, caring and cooking in the household. This system leaves the traditional divisions of labor between the genders untouched, and relieves the public sector of demands for care.

The border location of Austria and Germany, the disparity in income between West and East, and the presence of a large body of well-qualified workers in Eastern Europe encourage the employment of migrant women, especially from these countries. In order to regulate the so-called 24-hour care, Austria chose to legalize this form of domestic work. In Germany, migrant labor in the domes-

tic sphere includes legal, semi-legal and illegal residence and employment. Politically desired and subsidized in Austria, and informally tolerated in Germany, live-in employment has been established although it falls short of both countries' employment standards. Around-the-clock availability and high responsibility, combined with social isolation and low income, shape the work of migrant women living in their employers' households.

In Austria and Germany, with the help of the welfare state on the one side and migrant labor on the other, middle-class households are able to obtain the necessary care. In East European countries, however, a new bottleneck in supply is emerging, as the relatives of migrant women who stay behind lack care. Migrant women often attend to two households, shuttling between the Austrian or German households where they are paid to take care, and their home country, where they catch up on unpaid reproduction work.

> Care Work in the Public Sector

Especially since the 2008 financial crisis and subsequent austerity schemes, professional care work in elder care and in child care has come under considerable pressure, in part because new private providers have begun to compete for the region's substantial market. In addition, rationalization and reorganization measures in line with New Public Management have meant that workspaces and work processes have been streamlined, making them more economically efficient in ways that conflict with good care. In elder care, irregular work schedules make it difficult to safeguard mental care or even physical support. In kindergartens, the promise of upgrading child care work through education is offset by problematic conditions, such as large class sizes.

The domains of elder care and child care have long been regarded as "strike-resistant," because workers are often reluctant to leave the persons in their care unattended. But this dynamic has begun to change:

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kindergarten educators in Germany are currently on strike for better pay and working conditions, and for improved professional status. Strikes like these spread to Austria in 2009: Austria's "Kollektiv Kindergartenaufrustand" (Collective Kindergarten-Riot) was founded following Germany's last wave of strikes. The collective used alternative forms of action to call attention to poor working and employment conditions in child care.

In addition to union support for strikers in kindergartens and elder care, new forms of civil society and social movement action and alliances are emerging in both Germany and Austria. Initiatives such as Care Mob, Care Revolution, Care Manifesto combine critiques of care work organization with political demands that involve a fundamental critique of capitalism and proposals for alternative visions of a good life.

At the same time, however, rationalization in the care sector has gone hand in hand with new social polarizations and new divisions of labor, for instance between care management and care givers, undermining potential solidarity.

> Alternative Conceptions of Care

Finally, there are new proposals that aim to meet society's rising care

needs, while offering adequate organization of care work. Locally administered residential care communities, primarily catering to dementia patients, have developed since the 1990s, seeking to offer alternatives to both family care and nursing homes.

Local residential care communities are generally organized by family members, who continue to provide some care work while mobile care service providers take on the rest. This version of assisted living is constructed on the model of the family, but it becomes paid work. Most of these arrangements are middle-class projects, offering skilled personnel the opportunity to conduct their professional work in a more satisfying manner than in-patient care allows. But limited finances for these projects often lead to precarious employment relationships: qualified staff only works part-time, while precariously employed workers, often migrant women, take on menial tasks. Although the approach addresses neither poor pay nor low social recognition for care workers, it clearly reflects pressure to at least offer legal employment relationships.

> Care Work as Contested Terrain

These developments in the care sector highlight the polarizing effects associated with the reorganization

of West European welfare states. The latter have not only come under pressure from fiscal austerity. Reorganizing welfare activities has required making them productive from the standpoint of economic growth and (international) competitiveness. On the one hand allegedly "unproductive" expenditures for the elderly have been exposed as more or less informal ethnically stratified care arrangements. On the other hand, the increasing subjection of welfare to economic imperatives turns parts of care work, for instance in child care, into an investment in economic competitiveness and future career prospects of young people. However, our examples show that the decline in individual care, qualified work and social cohesion is related to divisive ways of organizing care work. Furthermore, the examples show that the path from the welfare state to the investment state has provoked protests that seek to organize care workers as well as receivers and to make care a contested terrain of social welfare. ■

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> Household Care under Precarious Conditions

in Chile, Costa Rica and Spain

by **Monica Budowski**, University of Fribourg, Switzerland and member of ISA Research Committees on Economy and Society (RC02), Poverty, Social Welfare and Social Policy (RC19), and Social Indicators (RC55); **Sebastian Schief**, University of Fribourg, Switzerland; **W. Daniel Vera Rojas**, Pontifical Catholic University of Valparaiso, Chile¹



*Precarious living in Costa Rica.
Photo by W. Daniel Vera Rojas.*

Societies organize care in different ways. Family and household members, especially women, provide most care; but how care is organized also depends upon state-provided services, purchasable services, and community support. Our study asked how the organizing principles of the welfare regimes shape care provision in Chile, Costa Rica and Spain.

Chile's welfare regime principles are liberal: they emphasize a strong role of markets and individual responsibility. Thus, we expected households to tackle care issues individually, relying on the gendered division of household labor if there are few affordable market services. Costa

Rica's principles are social democratic: state policies are important, and households will turn to state services and programs when in need. Spain's welfare policies incorporate many conservative principles: the state delegates care to households (primarily women) and protects those in formal employment (primarily men). So, in Spain, childcare would be managed by household and family members, only secondarily involving state policies and communities or friends. In all three countries, the gendered division of labor in households is central to care provision. And, of course, the ongoing financial crisis in all three countries affects how care issues are currently dealt with.

> Organizing Childcare in Precarious Households

For all three countries we asked how households in precarious socio-economic conditions near and above the poverty threshold (not poor, yet at risk of poverty) manage everyday life. Such households are not covered by social policies aimed at helping the poor, yet their limited financial capacity makes it difficult for them to outsource care work, for example by paying for childcare. Between 2008 and 2010, we interviewed people in the same sample of households in three cities (between 24 and 31 households in one city in each country) in order to explore how members of these households thought about and dealt with childcare.

Acceptable childcare in Chile depends on parents, on informal unpaid family support, and paid-for childcare services. Private (subsidized) formal childcare was used when it was considered beneficial for the child's development or when both parents' incomes were considered necessary to sustain the household's living standard or future plans. Respondents were ambivalent about the benefits of the labor market in care work: long working hours, poor working conditions, low remuneration and temporary employment were weighed against income, gratification, security and identity. Many respondents reflected a traditionally-gendered division of labor, with widespread acceptance that the "mother role" created a tension between paid work and care. Neither markets, the state, nor civil society organizations could alleviate this tension.

The Costa Rican households interviewed for the study organized childcare through the gendered and the inter-generational division of labor. Work and childcare were negotiated between different generations of women within the household, usually on the basis of who could best generate income. Sometimes women informally repaid each other for childcare: if one woman managed to find full-time work, other household members, who were unemployed or in part-time employment – grandmothers, siblings, in-laws – provided childcare. If need for childcare went beyond the household's own means, respondents believed that the state, and to a lesser extent, labor markets, could fill the gap. Labor markets in Costa Rica seemed to create less stress or complications for childcare than in Chile and Spain. However, men generally seemed less involved in childcare, and women did not explicitly demand their contributions.

In Spanish households, women tended to shoulder childcare on their own. The financial crisis has reduced job opportunities and cut public support for public childcare; and other safety nets barely exist. Few women in the sampled Spanish households had children. Those who did, criticized

the gendered division of labor in the household, and complained about the limited employment opportunities and the lack of affordable private or public care facilities – in part due to the financial crisis. Acquaintances and community stepped in to meet childcare emergencies. Many respondents attributed women's decision to limit their family size to an unjust gendered division of labor.

> Comparing Countries

This comparison of childcare arrangements in low-income households highlights two key points. First, it underscores the importance of the family and household for childcare, as well as the persistence of a gendered intra-household or inter-generational division of work within households. Second, it underscores the way welfare regimes, in tandem with countries' economy and social structure, have an important impact on the organization of childcare within those households.

For most households in precarious conditions (not poor, yet at risk of poverty) the gendered division of labor – along with household composition and size – was essential to the organization of childcare. Whether these gendered roles were societally accepted or questioned, and whether income-earning opportunities or state support were available, also affected how childcare was organized and experienced. Family-oriented policies in Costa Rica provided incentives to construct three-generation households, alleviating childcare. In Chile, a tense relationship among labor conditions, opportunities for work and childcare facilities, along with a traditional gender ideology, permeate the organization of childcare. In Spain, having fewer or no children decreases the burden of childcare for women. At the same time, the financial crisis has reduced public services and opportunities for paid work, so that mothers have had to shoulder and juggle childcare.

Organizing childcare was least stressful in Costa Rica, where other women, family members and state support buffered difficult situations. In Chile, labor conditions, the lack of affordable public and private childcare conflict with the gendered division of labor and traditional gender ideology to make childcare stressful. It was in Spain that childcare was most stressful, due to the combination of a gendered division of labor (considered to be unjust), a crisis-induced reduction in childcare facilities and limited employment opportunities. ■

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¹ The Swiss National Science Foundation funded the project. The University of Fribourg (Switzerland) collaborated with the Public University of Pamplona (Spain), the Catholic University of Temuco (Chile), and the University of Costa Rica (Costa Rica).

> Provision of Care in South Africa

by **Elena Moore**, University of Cape Town and **Jeremy Seekings**, University of Cape Town, South Africa and former Vice-President of ISA Research Committee on Regional and Urban Development (RC21) and member of Research Committee on Poverty, Social Welfare, and Social Policy (RC19)

High levels of financial assistance and physical care are needed and given in South Africa. Exceptionally high unemployment, persistent poverty and HIV-AIDS mean that approximately three quarters of the population of about 50 million – including 20 million children, three million non-working elderly people, one million disabled working-age men and women and a further 12 million unemployed – require some kind of care or financial support.

As early as the 1920s, South Africa began to construct a welfare state for its white citizens, based on the British model of tax-financed public services, social assistance and care, focused especially on “deserving” categories – women and children (and, less often, men). In South Africa, of course, “deserving” citizens were also racially defined: South Africa’s “African” or “black” population was excluded (first entirely, then partially) from the welfare state and social citizenship, as well as from the franchise and political citizenship. Restrictions on what work African people could do and where they could live reinforced a racial migrant labor system, forcing many working parents to leave children to be raised by grandparents to whom they remitted a share of their earnings. Only from the 1970s did the imperatives of economic growth and political stability push the apartheid state to slowly reallocate public resources towards people who were classified Coloured, Indian and later African – a shift toward a more inclusive system of care that was only completed after South Africa’s first democratic elections in 1994.

The deracialization of public policies, especially social assistance programs, public education and public health, has resulted in a welfare state that is extensive and redistributive (albeit unevenly so). This welfare state exists alongside growing market provision and continuing (though diminishing) kin provision.

Many children still live with extended families, often without one or both parents. Only one in three of South Africa’s children live with their biological fathers, and about 5.5

million children do not live with either biological parent. Relatives play a key role in providing care. At the same time, the feminization of the labor force and changing kin relations have resulted in increased market provision of care. About 30% of all children aged 0-4 attend some kind of crèche or day care facility.

The state provides care for children through schools, cash grants for caregivers (including foster parents) and, in the early 2000s, expanded preschool facilities. The scale of cash grants for caregivers is unique in terms of both coverage and cost (in relation to GDP), even when compared to more internationally famous programs such as Brazil’s Bolsa Familia.

The state supports elderly South Africans primarily through non-contributory old-age pensions. More than 1% of GDP is redistributed to almost three million pensioners. The old age pension is means-tested, but both income and wealth thresholds are set at a high level, so that only rich South Africans are excluded. The expansion of financial assistance for the elderly by the post-apartheid state contrasts with the rollback of publically provided care for the elderly. Direct (state-run old-age homes) and indirect (subsidized old-age homes) public provision of residential care for the elderly did not survive the transition to democracy. The old-age pension, which pays generous benefits, has significant indirect consequences for the provision of care and household finance. Three quarters of elderly people live in households with working-age adults, while a small number live with children without a working-age adult present. Whilst the elderly support young kin financially, younger family members seem to spend little time caring for the elderly.

About one million sick and disabled working-age adults receive disability grants. AIDS increased the number of sick working-age people requiring financial support and physical care. Qualitative research suggests that AIDS has strained bonds of kinship, and that sick kin are often unable to call on distant or even close kin for help. Kinship care continues to be gendered and AIDS exacerbated this pattern.

“Unlike the liberal welfare regimes of the Global North, South Africa’s social assistance programs have a wide reach”

South Africa offers little public support for unemployed, working-age adults other than workfare programs. Without state support and with no access to support through the market, unemployed adults are dependent on kin – but kin support is no longer unconditional. The idealized binding and inescapable kinship that anthropologists such as Meyer Fortes described more than 40 years ago appears largely absent today, as South Africans discriminate between deserving and undeserving kin, whether close or distant.

South Africa’s welfare and care systems display some similarities with liberal welfare regimes of the Global North. The state’s resources are directed towards means-tested social assistance programs, focusing on deserving categories of poor people. The state has encouraged expanded market provision of care, through contributory pensions and health insurance as well as private crèches.

Unlike the liberal welfare regimes of the Global North, however, South Africa’s social assistance programs have a wide reach. Almost one in three adults and children re-

ceives a grant of some sort and about two thirds of the population lives in a household where someone receives a grant. Grants thus reach about one half of all households, including most poor households. In terms of reach, these programs look more like the more inclusive social democratic regimes of the Global North.

Whilst kinship relations are changing, and support is increasingly conditional on individuals’ behavior and attitudes, many South Africans remain dependent on someone in their family for financial assistance and physical care. In this, South Africa resembles the family-orientated Southern European cases.

The deracialization of social grants and the change in kin support in the last few decades have pushed the South African welfare regime in a more social democratic direction, but the state has also retreated from its limited role in the provision of physical care (notably for some elderly people), pushing people into reliance on kin, and, increasingly, on the market. ■

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> Sociology in a Hostile Environment

by the **Public Sociology Laboratory**, St. Petersburg, Russia



Members of the St. Petersburg Public Sociology Lab. Top Row, From Left to Right: Maksim Alyukov, Kseniya Ermoshina, Svetlana Erpyleva, Ilya Matveev; Bottom Row, from Left to Right: Andrey Nevsky, Natalya Savelyeva, Dilyara Valeeva, Oleg Zhuravlev.

The Public Sociology Laboratory is an independent research group of leftist scholars and activists in St. Petersburg. Some of us took part in student protests against the commercialization of education, and the corruption and profanation of science in the sociology department at Moscow State University in 2007-2008, while others had participated in left-wing political and artistic associations while studying social science at different universities. In 2011, we decided to create a collective of committed scholars who would explore political protest in our depoliticized society. After conducting large-scale research during the “For Fair Elections” movement in Russia in 2011-2012, we began studying the Ukrainian Maidan and Anti-Maidan movements in Kyiv, in collaboration with the [Center for Independent Social Research](#) (CISR). Here, we focus on three issues: first, the context for the development of our project; second, what it means for us to engage in “public sociology”; third, the limitations that institutional milieu imposes on our activity, and how these limitations might be overcome.

> Russian Sociology: Between Instrumentalism and Professionalism

During our professional socialization, three types of consensus have taken shape in the discipline in Russia, lead-

ing to two types of sociological knowledge: instrumentalist, and professional. The first can be seen in the Institutes of Sociology of the Academy of Sciences, which lack structural autonomy, being the home of political loyalists, and in those sociology departments that are tacitly privatized by university administrations. In these institutions, scholars must either deal with the logic of the market (both the market of applied studies for commercial needs and the sale of diplomas), or participate in pseudoscientific studies of “The Middle Class,” “Transition,” “The Russian Time of Troubles,” etc.

In reaction to this kind of “official” or “instrumental” sociology, an “autonomist” faction took shape, arguing that “true” professional social science should disavow political commitment. From this perspective, both types of instrumental sociology are unprofessional, not only because they lack autonomy in Bourdieu’s sense, but also precisely because of their commitment to clients.

Our opposition to the instrumentalist consensus served as the platform for our protest against the policy of the Sociology Department of Moscow State University, but we also disagree with the apolitical consensus of “professionals.” Cooperating with activists who often were much more reflexive than professional scholars has gradually moved us away from doctrinaire and elitist perspectives, as well as from methodo-

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logical dogmatism. Sociologist Victor Vakhshayn, one of the most consistent proponents of the “autonomist” perspective, contends that “scientific” language in Russia has been replaced by “neo-Soviet” and “anti-Soviet” languages, and that to professionalize Russian sociology it is necessary to establish an “uncommitted” science.¹ Vakhshayn sees sociology’s mission as the “production of knowledge for knowledge’s sake”; any politicization of social science, he argued, would be destructive of scientific rationality.

We believe that this perspective is not, as Vakhshayn claims, a commitment to “value free” science. To the contrary, we believe this position is ideological in the sense most central to the post-Soviet neoliberal order: it reflects an ideology of depoliticization and common sense driven by disappointment in politics, the stigmatization of the public sphere, justifying an escape to private life. Vakhshayn’s generation has inherited this ideal of “pure knowledge” from their teachers – advanced “critics of bourgeois sociology” for whom the struggle for rigorous sociological knowledge was inspired by a need to determine the causes of the Soviet empire’s fall, rather than by any deep-seated aspiration for non-commitment. They treated sociology as a tool for self-actualization of society. However, in the context of depoliticization, this ideal of theoretical depth was transformed into fetishizing “pure knowledge.”

When Russian society began to be politicized during the 2011-2012 anti-Putin protests, Maidan and the War in the Ukraine, professional sociologists, following their audience, also had to turn their attention to protests. However, lacking experience in scientific reflection on politics they were doomed to either reproduce ideological clichés, or artificially place the reality of the protest into pre-established theoretical frameworks.

> What Do We Mean by Public Sociology?

If the generation of the teachers of “professionals” was inspired by tragic experiences of social change in the 1980s, and if “professionals” themselves were inspired by existential problems of society that led to a retreat into the realm of private life, then depoliticization itself became our existential problem, especially when our friends, the scientific environment and society, criticized our activism. So that is how we came to study depoliticization in the framework of the changing relations between public and private spheres.

Moreover, the investigation of the public sphere has prompted us to discuss our results with the very people we are studying, that is with emerging publics. Thus, we are now planning a conference with local civic activist groups which emerged during the protests of 2011-2012, submit-

ting our study to activists, in the hope that we can initiate discussion and establish a network among these groups.

We believe that the preoccupation with social and political problems requires exploring and understanding social theories from a new angle. Can we understand Durkheim’s project without being concerned with anomie? Can we explore theories of publicity from Arendt and Habermas to Fraser, Negt and Kluge without referring to the poverty of a life restricted to the private sphere? Our Manifesto states, “The main objective of the Laboratory is to combine a professional approach to social research with public engagement. The scientific questions that the Public Sociology Lab raises relate to relevant social problems, linked to the political situation in Russia and all over the world. Moreover, the mission of the Laboratory is to combine social engagement and civic responsibility with theoretical and existential depth, to resolve problems of ‘grand theory’ through empirical study of social problems. For example, the study of political mobilization during the latest protests allows us to pose the problem of loneliness and solidarity, individualism and solidarity.”

> Barriers to Public Sociology in Russia

But is it easy to adhere to this position in contemporary Russia? A few obstacles threaten our project’s very existence. We are caught between “professionals” and “instrumentalists” – as well as between large universities and the market in grants. Scientific institutions, whether the retrograde Academy of Sciences or “advanced” smaller universities, create rigid hierarchies and career rhythms that serve their own reproduction. This logic dissolves collaboration and solidarity by atomizing and subjugating researchers. This is why we have sought a foothold in CISR, Russia’s most independent, grassroots and professional sociological center. In turn, the grants market is rapidly shrinking because of state repression against dissident scholars. For instance, the publication of our volume *The Politics of the Apolitical*, dedicated to political protests of 2011-2012, was one of the reasons state officials have tried to indict CISR as a “foreign agent.”

Thus, today we face a hostile environment. So far we have depended on the limited resources of a strong moral and political consensus within our group, on wider connections and on informal leadership. However, this is not enough to sustain our project. We believe that we must create an “International” of scholars and artists that will unite committed scientists and intellectuals in our own region to those around the world. ■

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¹ See V. Vakhshayn’s article in *Global Dialogue*, 2.3 and response from N.V. Romanovsky and Zh.T. Toshchenko in *Global Dialogue*, 2.5.

> Socialist Ideals in Early Soviet Architecture

by **Natalia Tregubova** and **Valentin Starikov**, St. Petersburg State University, Russia

In Russian the word “soviet” means 1) council, assembly, board; 2) advice, recommendation, suggestion; 3) harmony, concord. As a term, it refers to a specific kind of political organization, introduced after the October Revolution of 1917, that radically transformed political power: “Councils of the workers’, peasants’ and soldiers’ representatives,” also known as “soviets.”

Soviets were envisaged as governing bodies elected by “those who work,” where everything would be based on collective decision-making. Early in the Soviet era, at least, these “soviets” were designed to facilitate direct democracy. They embodied new principles of social life – solidarity, collectivism and self-organization – yet at the same time these principles were based on the “dictatorship” of previously-oppressed classes.

This new sociality demanded new forms of everyday life in urban and rural areas – both in workers’ milieus and in peasants’ everyday practices. Mass education and cultural upbringing, urban migration, emancipation of women, new forms of governance – all these processes had to be embedded in patterns of everyday life, including its spatial organization.

This posed a powerful challenge for architects who were called to invent new forms and types of building construction. Thus, the world-famous Soviet constructivist avant-garde architecture of the 1920s and early 1930s was brought to life by the realities of social and political life.

One of the largest and most intact constructivist projects still visible today

is a complex of buildings in St. Petersburg’s (formerly Leningrad) Narvskaya Zastava district. A typical working-class suburb at the beginning of the twentieth century, Narvskaya Zastava was the site of the tragic events of “Bloody Sunday,” when a peaceful workers’ demonstration was repressed by the Tsar’s Imperial Guard in 1905. After the Revolution of 1917, this event was canonized, and became a sacred marker of the new proletarian ideology [Picture 1].

The Narvskaya Zastava area became a place for architectural experimentation, and a large public center of the wider industrial district.

Residential buildings at Traktornaya Street (built in 1925-27) were a top priority at a time when architects sought new principles of spatial organization as they developed public housing for the proletariat. Traktornaya Street is an example of the transitive style in both architecture and urban planning: it includes features of Russian Neoclassicism mixed with new avant-garde forms, supremacist motifs and functional zoning. The buildings at Traktornaya Street started a process of transformation for the whole district [Picture 2].

The first secondary school in Leningrad was opened in 1927. Named the School of the Tenth Revolution Anniversary, it was designed under an experimental program, with new methods of learning and training intended to stimulate pupils’ active involvement and independence, while reducing the number of teachers required. The school, which had about 1,000 students, included various types of classrooms, laboratories and

even an astronomical observatory [Picture 3].

This new architectural vision inherited functionalist ideas about the significance of public places. The first large project, undertaken by the trade union movement, was the area’s Community center (1925-27). Community centers provided places for the working class to socialize: theaters, classrooms, gyms, and libraries. In 1930-32 the Community center was expanded to include a School for vocational training, offering workers and young people opportunities to advance their professional skills [Picture 4].

The center of the ensemble at Narvskaya Zastava was a department store and dining factories (1929-31). These novel institutions were designed to provide mass-produced ready-to-serve dinners (not to be confused with the fast-food units of the latter part of the twentieth century!) and semi-finished meals. The building’s composition demonstrates the dynamics of everyday life: large forms, different shapes, interconnected vertical and horizontal lines, asymmetric sections. The huge glass-covered department store was visible from the street, an obvious manifestation of the ideals of radical openness, emancipation, and solidarity that were central to the early Soviet ideology [Picture 5].

This unique constructivist ensemble was completed with the building of the Kirov-district Soviet (1930-1935), which housed the district’s municipal council. The idea of powerful and democratic local governments was central to the discourse of Soviet political organization in the 1920s.

Visible from afar, this administrative center housed district authorities, cultural institutions, a bank, a post office, and an assembly hall. The project made use of all the functional and technical innovations of the age. At the same time, however, the building of the Kirov-district Soviet could also be regarded as a sign of the demise of the Soviet avant-garde: its quasi-classical portico and other details were symptoms of a turn toward modernized imperial architecture, embracing the new totalitarian ideology [Picture 6].

Some years later, a large square was created in front of the building, specifically to stage mass gatherings and rallies. In 1938, a statue of the

legendary leader of the Leningrad communist party Sergei Kirov was placed here [Picture 7].

A large monument commemorating Kirov (whose assassination in 1934 served as a pretext for Stalin's escalation of repression culminating in the Great Purge) indicated the end of the early history of Soviet architecture and society. The next age required other architectural forms, promoting other types of sociality: masses instead of collectives, totalitarian rule instead of popular democracy, and conformist consumerism instead of solidarity. Symbolically, the assembly hall seating 1,000 people was eventually turned into a cinema.

Today, almost a century later, the Narvskaya Zastava area is still an industrial district mainly populated by workers. The secondary school, community center, residential houses, and Kirov-district Soviet buildings retain their primary functions, although their significance as places for socializing and collective activity has faded. Constructivist architecture is overshadowed by structures of earlier (imperial) and later (Stalin and late Soviet) periods, and the whole area nowadays looks like a palimpsest. [Picture 8] ■

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Picture 1: Workers' Demonstrations at the Narva Gate before Bloody Sunday, 1905 with the Tsarist Armed Guard looking on. Artist unknown.



Picture 2: Residences along Tractornaya Street.



Picture 3: Early Soviet School with Observatory.



Picture 4: Early Soviet Community Center.



Picture 5: Early Soviet "Dining Factory."



Picture 6: Soviet of the Kirov District.



Picture 7: Statue of Communist Leader, Sergei Kirov.



Picture 8: Stalinist Architecture in the Narva Square.

All pictures except #1 were taken
by Natalia Tregubova and Valentin Starikov.

> Au pair Migration as a Rite of Passage

by **Zuzana Sekeráková Búriková**, Masaryk University Brno, Czech Republic



Since the early 1990s, au pairing has become an important migration route for women from Slovakia. Special recruitment agencies find host families and also run coaches to and from London. Here au pairs, at Victoria Bus Terminal in London, are seeing off their friend who has just finished her stay. Photo by Zuzana Sekeráková Búriková.

“**A**u pairing” brings together paid domestic work undertaken by temporary migrants, cultural exchange defined by national and international regulations, and basic living arrangements. According to British regulations passed in 2004 and 2005, au pairs are young foreigners who stay for up to two years with families in order to learn English and learn more about the country. Au pairs are supposed to live “as part of family,” receiving food, accommodation, and “pocket money” – not a wage – in return for childcare and/or housework.

Families are required to treat au pairs as equal. Immigration Directorate Instructions and agencies usually suggest treating them as family members.

From the early 1990s, au pair stays have become an important migration route for women from post-socialist Central and Eastern Europe, especially from Slovakia, which has one of the world’s highest per capita rates of au pair migrants. Media often portrays au pairing as an economic strategy to cope with difficulties of post-socialist transfor-

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mation. Certainly, in the Slovakian media and everyday discussions au pairs are linked to economic hardship and high youth unemployment, but also to the high symbolic value of foreign languages and overseas travel.

Yet 50 interviews with Slovak au pairs undertaken during a year of participant observation in London during 2004 and 2005 quickly revealed that their motivations cannot be reduced to an economic strategy alone. Generally, the desire to work, to earn more money or to learn English was mixed with much more personal issues: migration decisions were related to relationships with parents, partners and friends. If one person said she became an au pair to avoid tedious and badly-paid factory work, another might explain she decided to go because she had just gone through an ugly break-up and could not bear staying in the same village as her former lover. The apparent economic advantage of an au pair stay (or even the prospect of its commodification in the future) often camouflaged more complex, and less obvious motives. In general, it was much more convenient to claim that one hoped to learn the language, than to say that becoming an au pair would allow one to escape a dead-end romance or a restricted life in one's parents' household.

Before migration, most Slovak au pairs lived in their parents' households. Their au pair stays provided a perfectly legitimate means to gain independence: au pairs commonly viewed their stays as a period between leaving their parents and settling down (hopefully, starting their own families). They viewed their time abroad as offering a chance of adventure, experimentation and enjoyment. Au pairs did not send remittances back home, and were never expected to do so. Their earnings – that is, their “pocket money” – were spent as “pocket money” usually is, for fun, fashion, parties, and presents. Many also reported that a part of their earnings, though not most of it, was saved for the future or used for language learning. Many said in interviews that, in the future, they would have to be careful and save their money, or sacrifice their time and economic resources for their children. For now, however, it was important to have fun, experimenting with relationships and with what au pairs saw as a more advanced consumer culture.

Many au pairs described these experiments as part of a larger project: the stay abroad, becoming independent from one's parents and relying only on oneself were lessons in growing up and self-development. Au pairs often

compared their work to military service, which was still compulsory for men in the Czech Republic at the time of my research. For many women, au pairing was perceived as a kind of *rite de passage*, initiating them into adulthood by proving their independence.

This self-understanding has serious consequences for au pairs, since it prompts many to put up with situations they find oppressive. The equal relations between au pairs and host families recommended by legal regulations are hardly feasible under conditions of power asymmetry. Indeed, 82 out of the 86 host families for whom my informants worked did not fully comply with regulations: host families frequently demanded that their au pairs work more hours than they were supposed to, they failed to pay overtime, or they ignored the au pairs' rights for free time or language learning. Some au pairs were expected to sleep in the same room or even the same bed as the children they were looking after.

Au pairs' immigration status, the fact that they lived in homes which were also their “workplaces,” their lack of language fluency – combined with an ambiguous position within households where they simultaneously were and were not workers, guests, and temporary family members – left them particularly disadvantaged in negotiations over working and living conditions. For most au pairs, leaving an exploitative or unpleasant host family would mean facing three difficult options: finding a new host family, finding other employment in the UK or deciding to return to Slovakia.

Far too often, au pairs decided to stay even though they felt mistreated or faced exploitation. While some au pairs mentioned more pragmatic reasons for staying – such as not having money to travel back home, or lacking clear educational or employment prospects after an abrupt end to their employment – many felt they needed to prove that they could endure hard times. Several described staying in an exploitative situation as a test that proved they were adults, and that they did not need to run back to their parents as soon as things got tough. Paradoxically, structural inequality together with their commitment to growing up reduced their inclination to resist exploitation: the au pair's effort to demonstrate personal maturity may in fact contribute to their disempowerment. ■

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> Homeschooling Freedom and Control in Czech Education

by **Irena Kašparová**, Masaryk University Brno, Czech Republic



Anatomy lesson at home! Photo by Irena Kašparová.

For the last two decades, the school performance of Czech pupils has steadily declined, according to various international means and measures (e.g. PISA standards) – a fact that has provoked a national debate about education, its role, directions and methods. Dissatisfied not only with comparative standards but with broader social issues, such as lack of an individual approach and lack of freedom of choice in compulsory education, parents say that they are generally dissatisfied with a predominant lifestyle, in which work and schooling separate parents from their children from a very early age.

After the communist era – decades of suppressed individualism – some Czechs have argued that individuals must take responsibility for themselves and their families. Post-communist governments have opened up new possibilities in several areas of the social sphere, including education. As a result, homeschooling has been introduced as one of several educational alternatives.

In practice, Czech homeschooling is quite varied, ranging from unschooling – a child-led learning philosophy – to the strict pursuit of the official school curriculum in the home environment. Although there is some evidence

of increasing demand among the Czech parents for this educational possibility over the last ten years, it remains a minority practice, involving less than one percent of school-age children.

During the communist era (1947-1989) students had no choice but to attend state-run schools through the nine years of compulsory education. There were simply no alternatives. Thus, almost all current Czech parents (aged 30 and older) were themselves educated in the communist ideology, stressing equality, similarity, conformity and uniformity.

For many parents, then, homeschooling is a new phenomenon, and seems to be a truly revolutionary idea. After some well-educated parents who had lived abroad lobbied forcefully for it, homeschooling was legally established as a child's and parent's right in 2005.

Under the new law, parents have a right to educate their child at home, albeit only through primary school (grade 1 to 5). Legally binding conditions include a teacher-parent with at least a high school diploma, and a letter of support from a state-run Pedagogical-Psychological Advice Bureau. Teacher-parents must explain why they want to teach the child at home, and must demonstrate a satisfactory learning space (meaning suitable furniture, environment and space in the flat). The child must take official school exams at least twice a year.

The law offers freedom in education, but at the same time it shows the state's desire to control this freedom as much as possible, by requiring that parents demonstrate cultural as well as financial capital. Both parents and children must undergo testing by a Pedagogical-Psychological Advice Bureau, which acts as the state's gate-keeper and has sanctioning power. Some parents report they had to visit several Advice Bureaus in order to gain the necessary certificates.

Why did the Czech state make the Advice Bureaus – whose key function has been to prevent exclusion from

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mainstream schooling – an arbiter of homeschooling? Many officials, being of a conservative bent, do not support the idea of homeschool exclusion, and reject applicants on the basis of individual attributes while overlooking systemic factors, particularly access to economic resources. Unlike schools, which are allocated a set amount of public money for each child enrolled (including homeschooling children, whom they examine twice a year), homeschooling parents get no financial support from the state to provide books, furniture, learning materials or subsidized food. Homeschooling, often linked with part-time (or no) income of one or both parents, can be practiced only by those who can afford it.

The concept of exclusion in education is politically and culturally very sensitive in the Czech context. In the past, homeschooling was portrayed as exclusive for two fairly different reasons. On the one hand, there was the experience of Czech nobility and oligarchy, who could afford private tuition – a type of exclusivity portrayed after the revolution as an unfair privilege of the rich. Members of this social class were dispersed after the communist takeover in 1947. The new regime argued there was no need for homeschooling under communism, since free quality education was provided for all.

On the other hand, under communism, exclusivity and homeschooling took on a very different meaning. Since schooling after the revolution stressed uniformity and

universality, there was no space for difference. Children with “non-conforming” abilities, either physical or mental, struggled to find a place in mainstream education. Special schools were established for those labeled “different” – including whole ethnic groups, such as the Roma. If these special schools did not suffice, the child was to be educated at home. Those who had to be homeschooled under the communist regime were subject to pity, as unfit for inclusion in a healthy society.

Currently, the minister of education has dismissed any possibility of legalizing homeschooling after the elementary grades. His standpoint illustrates the ambivalence that homeschooling still provokes among the Czech public. Although de-centralization and liberalization of the country provided legal as well as social grounds for homeschooling as a viable alternative, its binding conditions mean that in practice it is highly selective. While the law provides some space for alternatives, its roots are firmly embedded in the state, thereby camouflaging its selectivity. Much as it did during the communist era, exclusion still evokes a loss of state control, which is still regarded as undesirable. As such, we are left with a paradox: The state opens up an inclusive schooling policy in the form of the homeschool, yet simultaneously the control mechanisms which regulate homeschooling turn it into an *exclusive* niche. ■

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> Remembering Roma Workers in the Czech Republic

by **Kateřina Sidiropulu Janků**, Masaryk University Brno, Czech Republic



*The Roma Exhibition at the National Theatre Piazzeta in Prague.
Photo by Michal Hečovský.*

It is May 15, 2013 and we are standing in the sunny square in Olomouc, a city halfway between Brno and Ostrava, where we are staging the project *Memory of Roma Workers*. It is the first big encounter of the whole team. More than ten people – academics, community workers, and teachers – stand in a circle to discuss the warm-up tasks at the beginning of a long day. There is no better way to get acquainted, to start building mutual trust, than working together on a common goal. Our goal is to prepare an exhibition about the Slovak Roma who came to Czech lands to work after 1945, to commemorate these events and to imbue the Roma in Czech society with a more dignified status.

“When I walk around the city quarter where we operate, I always ask young girls I do not know well, ‘Khatar sal?’

(Where are you from?). Because I know they all came from somewhere, and their families have roots in Slovakia, as has my own,” says Božena Dudi Koťová, a community worker and daughter of a Roma writer, activist and former worker who first came to today’s Czechia from the Slovak-Ukrainian border in 1952. The architect of the future exhibition is listening, other team members agree with the exhibition title and I am happy the project filmmaker caught that formative moment on camera.

“How do you spell ‘Khatar sal’?” I ask, because my Roma language is very weak. I know only some basic phrases – enough to greet, to offer a symbolic gesture of respect, and as a defense strategy when needed. Roma language is too complicated for me; I did not make it through the fifth lesson. Božena spells the sentence and adds, “But we should

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name the exhibition *Khatar san?* because it is still a habit to use formal terms when addressing the elderly.”

It is September 8, 2014 and I am reading my opening speech in front of a chipboard replica of a house, raw on the outside, painted in the colors of the Czech and Roma flags on the inside. About fifty people form a ceremonial crowd. One of them is a plainclothes policeman specializing in extremism, probably here because we told the local police we planned an exhibit on the Ostrava-Vítkovice square, with a shy request asking whether they could oversee things. We do not know what might happen. Or if anything will happen. To the exhibition? To us? The councilors of the central district of Ostrava refused to give us a permit to put the exhibit in the main square, and ignored our invitation to debate their decision. “No wonder,” one of the visitors in Ostrava-Vítkovice says. “They feel responsible for the image of central Ostrava and they do not want it to look like a gypsy land.”

The chronicler of Vítkovice sees it differently. “I am excited we have this new cultural form right here, no one else in Ostrava has it.”

What was the biggest surprise? No vandalism during the exhibit’s five weeks on display. Roma families coming dressed up to see and listen to their relatives’ and neighbors’ stories. A homeless man thanking us for a very interesting experience, entering the exhibition. Teenage passers-by using the latest technologies, all dressed up, contemporary, but hysterical at the possibility of even approaching closer, because we might start talking to them. Senior Czechs remembering Roma co-workers, neighbors and teenage loves from the 1960s. The director of an elementary school full of Roma pupils, who does not know that a Roma flag exists – and appears unashamed to acknowledge her ignorance.

It is February 9, 2015 and I receive an email from the Czech Ministry of Culture, which funded the *Memory of Roma*

Workers project. We made three exhibitions as promised, but they did not last two months each, as the conditions of the grant had stipulated. In spring 2014 I fully intended to meet the two months condition, but as the obstacles and more-or-less transparent political and administrative pressures mounted, I slowly moved back from this condition and forgot that it was crucial for the grant fulfilment. I was simply overwhelmed by the administrative complications of the whole process (including getting fifteen permissions for one spot, an all-time record) and by the confusing and sometimes unfriendly communication style. We already have two groups interested in supporting follow-up exhibitions. An independent curator from abroad saw our exhibition and sent an appreciation, together with a request that we explain the working of the retro phone with which you could dial and listen to different narratives of Roma witnesses.

Besides the interest in further exhibitions, there were contributions to theoretical reflections on inter-ethnic relations, education and eliminating social inequalities, or the possibilities of empowering civic dialogue and dealing with differences in the age of the “uncooperative self.” We estimate that 2,500 people saw our exhibition from the inside, and hundreds more through the outside windows. We certainly don’t feel it was all in vain! But according to applied-science criteria we failed, and we are back at square one.

So we start preparing another exhibition tour. Luckily one supporter saved all the exhibits literally just as we were closing. He wants to display them at the bus stops in his town, an industrial center where few Roma witnesses of post-war working migration from Slovakia are left. Rents in the city center ran high after 1989, and most Roma left for the region’s peripheral areas – one of many similar post-socialist patterns in Czech cities.

Innovative applied science is the most fulfilling – and frustrating – professional challenge I have faced in years. ■

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> The Changing Landscape of Chinese Labor Politics

by **Lefeng Lin**, University of Wisconsin, Madison, USA



NGO activists and workers celebrating a successful bargaining session in Guangzhou. Photo by Lefeng Lin.

Since 2010, when China was hit by a national strike wave, media and activists have often portrayed Chinese workers as restless, engaging in countless riots, strikes, and walkouts. But today, labor NGOs (nongovernmental organizations) and young labor scholars tend to tell similar stories: especially in Southern China, where most of the country's global manufacturers are located, workers' resistance is moving from individual legal action to collective action, from unplanned riots and work stoppages to strategic strikes and bargaining. Behind all this, labor NGOs and activists play a key role in mobilization and organizing.

At the same time, labor scholars and activists have long criticized the Chinese trade union system as bureaucratic and unrepresentative. Many observers suggest that perhaps

the only tangible thing that trade unions do for workers is to lobby for new labor laws: union chairs often hold leading positions in Communist Party committees and People's Congresses at both the national and local levels, so they have a visible role in making laws. Generally, the union system runs like a bureaucratic party organ: union officials are appointed by the party, and may have little contact with workers or knowledge of labor relations. Furthermore, many officials care more about how many union members they represent – and how many fees their union collects – than they do about labor rights. In strikes, observers often see the union officials cooperating with government officials or employers, trying to persuade workers to go back to their jobs. On the shop floor, unions often seem more interested in controlling workers than in solving their grievances.

When I began my fieldwork in Shenzhen, I assumed that labor NGOs and activists – not official unions – held the key to labor's future, and if I had limited my observations to NGOs, factories, and communities, probably I would still believe that NGOs were central to labor struggles. However, once I gained access to local trade union offices, I began to see that unions as well as NGOs are adapting to China's rapidly-changing system of labor relations, and that Chinese labor politics are being reshaped by both trade unions and NGOs.

The involvement of labor NGOs in organizing and mobilizing workers is a relatively recent development. For the past decade, labor NGOs have mostly provided services to workers from rural areas, who have little access to the social resources available to China's registered urban residents. NGOs offer legal aid to workers who know little labor law and have no money to find a lawyer, and provide simple entertainment like movie screenings, or other community services like after-school programs.

Since 2010, however, many workers have begun to participate in workplace actions. In response, some labor NGOs now train their staff to help with union organizing and collective bargaining. But labor NGOs face real challenges: their agendas are often constrained by international funders, and they face political repression from the Chinese state. Many labor NGOs are very small, and have limited resources for organizing work. Further, labor NGOs are often relatively isolated from one another, due to disagreements among funders or ideological differences. Some NGOs also have narrow organizational interests: if one NGO gets involved in a strike, it may push other NGOs away. These organizational issues often complicate what outside observers sometimes assume to be a cohesive "civil society" strategy.

Knowing that labor NGOs compete for workers' support, China's trade unions have begun to move into areas long associated with NGOs. Increasingly, trade unions offer their members legal aid, psychological assistance, poverty relief, scholarships for continuing college education, skill training, tuition discounts for getting professional certificates, training for union-building, and collective bargaining. With greater resources and access, trade unions can often accomplish much more than small NGOs. Some unions are paying more attention to mobilizing workers on the shop floor, even going so far as to hold democratic elections, promising to become accountable to members and to represent their interests.

However, unions' beneficial programs and their reform policy still do not reach down to most factory branches. China's trade unions have seven administrative levels: central, provincial, municipal, district, street, community, and factory. Only factory-level unionists are employees; at all other levels, union cadres are officials recruited by the party. Though unions have a vertical administrative structure, higher-level unions cannot command the lower level, because the union officials at each level are appointed by the corresponding party committee rather than by the higher-level union – a common political structure in China, sometimes described as the segmentation of "trap-and-block".

The problem is especially obvious when both trade unions and labor NGOs intervene in workers' strikes. Last June, workers went on strike after a restructured shoemaking company in Long District in Guangdong Province failed to reach an agreement with its workers on wages and benefits. An independent NGO helped workers organize, coaching them on how to deal with the employer and

police. In response, the municipal union took an unusual step: it sent officials to the region, asking the district union to support the striking workers.

However, neither the district union nor government agencies followed the municipal union's suggestion. Instead, on the advice of the district party leader, they allowed the employer to fire strikers, and the police to arrest workers' representatives, hoping to repress the strike – which they did, albeit at a cost. When a fired worker committed suicide by jumping from the factory building, subsequent media exposure put significant pressure on the city government and party committee. The municipal union angrily criticized the district union and government officials, but the matter ended there: the municipal union has no mechanisms to hold the district union accountable.

In response to workers' collective action, both labor NGOs and trade unions are transforming themselves. Over the past year, labor NGOs have built a labor network and integrated their resources. Their efforts to organize labor protests are increasingly coordinated. In a particularly intriguing shift, the Shenzhen municipal union last year created an experimental zone, breaking up its old organizational structure and recruiting professional organizers, seeking new ways to organize workers, charting a path between social upheaval and conservative bureaucratization.

With interaction among trade unions, state, employers, labor NGOs, and workers, could a new form of industrial unionism be emerging in China – one that is different from that found in other late industrializers? In a time when global labor activists tend to ignore the potential role of the state in labor relations, China may yet offer an example where state and society still play a central role in improving citizens' lives at work. ■

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> Forging a Program for Social Science on a World Scale

by **Ercüment Çelik**, University of Freiburg, Germany, and Board Member of ISA Research Committees on Labor Movements (RC44) and Social Movements, Collective Action and Social Change (RC48)



Members of the Global Studies Program
at Jawaharlal Nehru University, New Delhi.
Photo by Ercüment Çelik.

During the last two decades creating a non-hegemonic social science on a world scale has been a major concern for social scientists in both the South and North. Critiques of Eurocentrism and the rise of social theory from the Global South have generated enthusiastic debate about the necessity of, and opportunities for, learning from the periphery/South and through mutual learning on a world scale as well as a dialogue between professional and public engagements of social scientists.

What light can the thirteen years' experience of the Global Studies Program (GSP) shed on these debates? The GSP is a two-year social science Master's Program, jointly conducted by the University of Freiburg, Germany; the University of KwaZulu-Natal and later the University of Cape Town, South Africa; FLACSO, Argentina; Jawaharlal Nehru University, India; and Chulalongkorn University, Thailand. Its curriculum includes sociology, political science, anthropology, labor studies, international relations, and geography. Since 2002, more than 300 students from 60

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countries have joined the GSP, each studying at three of the participating institutions.

Through this international, interdisciplinary and intercultural program, students experience different university traditions, teaching and learning processes. They discover the societies that they live in during the program, and also re-discover their own. The final product is a unique high-quality master's degree, and individuals gain incomparable life experiences – including, above all, a set of values which form the basis of a global social science. The GSP experience enables students to understand what real “cosmopolitanism” is: the intercultural environment offers them the opportunity to live in places and conditions different from those they know best. Through these encounters, students develop new abilities to understand, to tolerate and to recognize “others.” Inadvertently, the GSP has become a platform on which participants develop and consolidate, what Ari Sitas calls an “ethic of reconciliation,” ideas of voluntarism and cooperation, mutuality and respect.

The practice of social science on a world scale requires intercultural competence not only on the part of students, but also faculty members and administrators, who are expected to be sensitive to the needs of students from different countries, institutional settings, work cultures, etc. The readiness to assist these students is one of the aspects of the development of such a social science on a world scale, which encourages participants to see students not as a burden, but as a potential. The GSP faculty engages an important “global public”: articulate, confident, socially and interculturally-engaged “global” citizens, who bear the potential to shape our globally connected societies.

A non-hegemonic mutual learning should be a core aspect of any such program. One can imagine that GSP – with partner universities in four continents, each with its particular traditions and knowledge systems from both Europe and the Global South – is a perfect framework for recognizing and applying a globally connected system of knowledge. Raewyn Connell notes that as graduate programs in the metropole are constrained by the professional norms of metropolitan science, it is a challenge for them to move towards a globally inclusive curriculum. The GSP at the University of Freiburg faced precisely this challenge in the last decade. Nevertheless, despite all the curricular and institutional constraints, faculty members paved the way to create more inclusive readers through new courses and lectures such as “The Modernity Debate and Challenges to Eurocentrism,” “Sociologists as Public Intellectuals:

A Southern Perspective,” “Metaphor, Allegory and Parable in Global Sociology.” Students responded positively. Critical essays, especially by students from North America and Germany, demonstrated how their undergraduate studies had been dominated by Euro-America-centric knowledge, and how little they were aware of it.

The GSP dynamics of building dialogue between professional academic work and public engagement is a contribution to what we now call “public sociology.” When we revisit the history of GSP, we will find that during their studies at partner universities in different countries, students were encouraged to do fieldwork, often connected to problems at the heart of these societies. Required internships enable them to participate in the actual work and lives of social movements, NGOs, community organizations, trade unions, as well as academic and governmental institutions, etc. In Michael Burawoy's terms, “they retain their connection to civil society.” The students become “organic” GSPI-ans whether or not they are sociologists. In most cases, these “public” engagements develop into academic work and scientific analyses in their master's theses. The GSP provides a platform for connecting public, policy, critical and professional sociology, and, in particular, generating a dialogue between professional and public sociology.

One of the GSP's most serious constraints is the market agenda that shapes university systems around the world. A crucial issue is the increasing precarious working conditions for academic staff, which negatively affects the program's stability. Especially in Germany, mid-level faculty and administrators have no job security, and most will have to leave the program at some point regardless of their commitment to the vision of the GSP.

Another concern is the uneven power relations between the partner universities. Consciously or unconsciously, the University of Freiburg is often perceived as taking a dominant role in the partnership; in the future we can expect partner universities to insist on an equal role in shaping the program. Indeed, an egalitarian structure is crucial for the success of the GSP and similar programs.

Despite all challenges, however, the GSP experience provides valuable input into the development of a social science on a world scale, encouraging learning from the periphery, practicing mutual understanding and opening an academic platform where sociological imagination can be combined with political imagination. ■

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> Professions in an International Perspective Opening the Box¹

by **Ellen Kuhlmann**, Karolinska Institutet, Sweden; **Tuba Agartan**, Providence College, USA; **Debby Bonnin**, University of Pretoria, South Africa; **Javier Pablo Hermo**, University of Buenos Aires, Argentina; **Elena Iarskaia-Smirnova**, Higher School of Economics, Moscow, Russia; **Monika Lengauer**, Technical University of Dortmund, Germany; **Shaun Ruggunan**, University of KwaZulu-Natal, South Africa; and **Virendra P. Singh**, University of Allahabad, India; all the authors are members of the ISA Research Committee on Professions (RC52)

Globalization has fundamentally expanded the scope and practice of the professions, especially in emergent economies. Rapidly developing markets in the BRICS (Brazil, Russia, India, China and South Africa) and some other middle-income countries have created new demands for professional expertise and services in both public and private sectors – even as the neoliberal turn in the Western world has questioned welfare state principles, and when austerity politics have further curbed public funding for professional services.

These developments provide unique opportunities for “real time” research into changing professions in different social contexts. At the same time, viewing professions through a global lens requires critical reflection on the concepts of professions and professionalism – concepts built on the political and economic conditions of twentieth-century Western welfare states.

Although the state has been central to discussions of professions, sociologists rarely reflect on the geopolitical and cultural contexts of specific concepts of “state” or “citizenship.” Recent research pays greater attention to globalization and transnational governance, strengthening international comparison, but many discussions of professions still primarily look at Western countries, paying little attention to the Global South or Eastern countries.

We seek to turn existing approaches upside down, drawing on research carried out by different authors in South Africa, India, Argentina, Russia, Turkey and the Arab countries. Lacking a common “reference unit” beyond the concepts of “welfare state professions,” however, we offer the examples below as snapshots of professional development, using the relationship between states and professions as a unifying theme.

In Arab countries, “professionalism” is often described as a universal concept and goal. Arab professionals (e.g. university professors) discuss professional values in terms that

are strikingly similar to the functionalist approaches of the 1960s and 1970s, which focused on such traits as integrity, confidentiality and trustfulness as well as social responsibility, objectivity, and knowledge-based work. At the same time, traits that were key to Western functionalism, like the organization of professional associations and the goals of control and monopoly, are missing – demonstrating that universal approaches to professionalism may be strategically mobilized to build a professional field, but professions still lack a firm basis in scientific evidence or possess mature mechanisms of public control and state support.

In both Turkey and Russia, centralized states have constrained the scope of professional groups as well as the idea of professionalism. Hence, policy changes in both countries reshape the state-professions relationships, albeit in different ways. As a middle-income country, Turkey’s emergent market logic with increasing consumerism, has increased the demand for public sector services. At the same time, policies stemming from new public management have tried to control the professions. In the health sector, for example, the combination of different strategies is obvious. New management policies have increased controls of doctors, but also created new bonds between the medical profession and the state: the government has introduced new management positions for doctors, while the medical profession increasingly integrates management into medical education.

In Russia, during the 1990s, there were major transformations in the professions. For example, a new profession of social work emerged, combining old and new value systems to create a professional field with its training systems. While the government’s low-wage policies and gendered cultures of social work constrained professional development, new market-driven social policies furthered professionalization: social workers were needed to provide access and validate claims to social rights. Consequently, social work is both increasingly integrated into the public sector while also benefiting from market expansion. At the same time, social work-
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“many discussions of professions still primarily look at Western countries, paying little attention to the Global South or Eastern countries”

ers lack the power to define their identity or their position in the new marketized policy arrangements – arrangements that may also transform their relationships with clients.

India and South Africa are both experiencing economic growth and emergent global power and both countries have also established more plural governance arrangements. Professional development is shaped by both globalization and colonial history, and in both countries, the Anglo-Saxon model of liberal welfare state has led to professions with strong self-governance, including control over access to the profession.

In India, the legal profession is at the hub of strong forces of globalization as well as national regulation that constrains market competition among law firms and restricts access of foreign lawyers. Both Indian and foreign law firms have developed strategies of market expansion through new forms of corporate investigations. India is becoming a major destination for the outsourcing of legal processes, a strategy already familiar in IT and publishing sectors. Such transformations have created a small elitist professional segment, while undermining the status of legal professionals who cannot compete in a globalizing market. In this elitist sector, state interventions have had limited power to reorganize the professions due to the influence of global corporate politics.

South Africa's rapid economic growth has coincided with public professionalism and integration into the public sector. Post-apartheid politics include strong demand for more inclusive professional development. Even so the professions remain structured by gendered and racial or ethnic patterns of inequality. Here, professionals have been able to mobilize strong self-governing capacities, separate from the state, preserving occupational monopolies by controlling access

to professional fields. Re-stratification, marketization and management changes have entrenched gender and racial inequalities, despite the absence of (formal) legal and state support and despite new legal requirements designed to promote inclusion. Recent state efforts to regulate the professions – part of the state's transformation agenda – may challenge long-standing occupational monopolies, opening doors for previously excluded social groups.

Finally, Argentina's growing economy has also offered expanded social services, with increasingly plural governance. Here, historically-strong connections with Europe (especially the Latin countries) have shaped public sector professionalism – including, new transnational options for higher education, especially in professional education and postgraduate studies. Professional groups have responded to transnational markets by creating both new career chances for individual professionals and new processes of knowledge production and skills certification. This example highlights how globalization and transnationalism may strengthen the role of the professions as change agents and policy players not only nationally, but also potentially internationally.

Our case studies involve a range of professional fields, from higher education, law and media to social work and medicine. Though each story is unique, and all are still unfolding, each will contribute to a still-evolving global perspective on the professions. ■

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¹ This is a contribution from the ISA Research Committee on Professions (RC52). For details of the country cases and authors, see http://www.isa-sociology.org/pdfs/rc52_professions_in_world_perspective.pdf.

> Thank you, Nacho!

by **Izabela Barlinska**, ISA Executive Secretary, Madrid, Spain



José Ignacio Reguera, known to all at the ISA as Nacho.

In January 1987 a container with ISA files traveled from Amsterdam to Madrid and the ISA Secretariat started a new life. Soon after we had unpacked and installed ourselves, preparations began for the ISA XII World Congress of Sociology in Madrid. In those days the ISA had some 2,000 members (as compared to 6,000 today), the Congress program was typed on regular typewriters, and fax was the latest means of communication.

It was then that José Ignacio Reguera, known to all of us as Nacho, joined the Secretariat's staff and he has been working with us ever since – for nearly 30 years. He has now decided to enjoy his retirement. During these three decades, Nacho developed our membership database and when the Internet era began he became the ISA's first webmaster. Thank you, Nacho, for all your dedicated work in advancing the ISA from a home-run association to its modern international structure. ■