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GOOD AND BAD SOCIOLOGY: DOES TOPIC MODELLING MAKE A DIFFERENCE?

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ABSTRACT: The changing social reality, which is increasingly digitally networked, requires new research methods capable of analysing large bodies of data (including textual data). This development poses a challenge for sociology, whose ambition is primarily to describe and explain social reality. As traditional sociological research methods focus on analysing relatively small data, the existential challenge of today involves the need to embrace new methods and techniques, which enable valuable insights into big volumes of data at speed. One such emerging area of investigation involves the application of Natural Language Processing and Machine-Learning to text mining, which allows for swift analyses of vast bodies of textual content. The paper's main aim is to probe whether such a novel approach, namely, topic modelling based on Latent Dirichlet Allocation (LDA) algorithm, can find meaningful applications within sociology and whether its adaptation makes sociology perform its tasks better. In order to outline the context of the applicability of LDA in the social sciences and humanities, an analysis of abstracts of articles published in journals indexed in Elsevier's Scopus database on topic modelling was conducted. This study, based on 1,149 abstracts, showed not only the diversity of topics undertaken by researchers but helped to answer the question of whether sociology using topic modelling is "good" sociology in the sense that it provides opportunities for exploration of topic areas and data that would not otherwise be undertaken.
KEYWORDS: unsupervised text analysis, LDA, topic modelling, sociological methods, big data sociology

INTRODUCTION

In taking up the good and bad sociology theme, it is essential to remember that "sociology has always been a divided and controversial field" (Wilterdink 2012: 2). The same is true of the research methods used in sociological sub-disciplines, which further reinforce the conflicts and divisions within this social science (cf. Gouldner 1976). The principal juxtaposition arose between the quantitative approaches, usually based on surveys, and the qualitative domain, which mostly involved interpretative studies of textual data, e.g., interview transcripts, personal documents, media discourse. The ready availability of large amounts of digital information and the rise of powerful computational methods of analysing undermine those established distinctions and pose a significant challenge for sociology in a technologically networked society (Baranowski 2021; Selwyn 2015). Sociological methods require serious re-thinking, and there is a pressing need for developing new methods or adapting those already developed in other disciplines. Otherwise, sociology would remain stuck with a twentieth-century tool-set and risk sliding towards irrelevance and obscurity (Adorjan & Kelly 2021; Baranowski & Mroczkowska 2021).

One of the recently developed approaches allowing large-scale and rapid information extraction out of vast text bodies is topic modelling. It should be noted—following Hannigan et al. (2019: 589)—that "borrowed from computer science, this method involves using algorithms to analyse a corpus (a set of textual documents) to generate a representation of the latent topics discussed therein (Mohr & Bogdanov 2013; Schmiedel, Müller, & vom Brocke 2018)". Topic modelling, most commonly based on Latent Dirichlet Allocation (LDA) (Silge & Robinson 2017: 89-108), represents one of the recent advances in Natural Language Processing, which bring about massively enhanced opportunities for using content analysis in the context of sociological research. In general, it involves a fundamental transition from the survey mindset—extrapolation from small samples of carefully curated and structured data—to the Big Data mindset where large volumes of loosely organised information are processed at speed to discern the signals from the overall noise. On the other hand, while being a statistical approach, topic modelling defies the traditional juxtaposition of quality vs quantity, as it produces formal quantitative insights into the qualitative domain of meaning.

While quantitative content analysis existed within the classical paradigm of social sciences (Weber 1990), it was notably limited in its applications due to its low scalability. Consequently, the study of textual data has traditionally become a domain dominated by qualitative approaches, with quantitative accounts subsisting at the margins. Text-focused machine learning techniques remove the scalability limitations, as algorithms can read previously unimaginable volumes of text and handle highly complex coding schemes; their "reading" is also controlled by explicit parameter settings and, therefore, replicable. In particular, topic modelling allows for identifying the thematic structure of a large corpus of documents, which roughly resembles the highlighting technique of classical content analysis in that it marks every document—or some of its smaller constituent parts—with the probability of belonging to each of the topics

identified in the overall corpus of documents. Apart from the easy scalability, topic modelling also allows for multiple iterations and, unlike its classical counterpart, is not bound by a coding scheme fixed before the commencement of analysis. At first glance, topic modelling also seems to reduce the arbitrary impact of human subjectivity in that it does away with human coders; however, even though the analysis is explicitly specified in the form of replicable computer code, the decisions made by the code-writing analyst shape the model outputs in powerful and often not entirely predictable ways.

This paper demonstrates how topic analysis can be implemented into sociological inquiry making sociology "good", i.e. at least better off than with its current inventory of methods. Based on an LDA analysis performed on 1149 abstracts of academic texts mentioning topic modelling, we (i) discuss the application of LDA in the context of traditional methods of content analysis, (ii) present basic insights into the thematic structure of articles using topic modelling, (iii) conclude with recommendations concerning future use and research opportunities associated with computational approaches to the analysis of textual data.

LITERATURE REVIEW

The need for systematic content analysis yielding quantifiable results was recognised at the outset of modern social sciences—even before the first world war, Max Weber put forward a proposal for exhaustive press monitoring to measure the "cultural temperature" of society (Lazarsfeld & Oberschall 1965). While Weber's ideas could not be matched by any existing methodological tools and research infrastructures, pioneering research on the press's discourse was empirically taken up by the next generation of researchers, most notably perhaps by Harold Lasswell (1927). However, the formulation of the classical paradigm of content analysis is typically associated with Bernald Berleson's stipulation that it amounts to a "research technique for the objective, systematic and quantitative description of the manifest content of communication" (1952: 18). According to Berleson, content analysis was supposed to serve the following five aims:

1. Describing the substance characteristics of message content
2. Describing the form characteristics of message content
3. Making inferences to producers of content
4. Making inferences to audiences of content
5. Predicting the effects of content on audiences

In the narrow sense, the classical content analysis boiled down to the first two of those aims as it matured into a set of techniques geared towards the systematic classification of communications allowing for exploring their content and formal characteristics. In terms of the expected structure of the research process, the quantitative content analysis came to be conceived as a survey with documents standing in for respondents. Due to its limited significance in social sciences, the field also did not

benefit from much innovation. The postulated sequence of steps required to conduct a content analysis remained fixed over the decades: (1) formulating the research problem, (2) selecting a sample of content, (3) determining the units of analysis, (4) specifying the coding scheme, (5) coding and (6) statistical analysis of the coding output (Mayntz, Holm, & Hübner 1976).

The classical approach suffers from several substantial limitations. Firstly, the necessity of sampling due to the practical impossibility of reading all content, which can arguably be performed better than in human surveys as documents have higher response rates, but still brings about some sampling error. Secondly, the essentially aprioristic nature of the coding scheme—although some free reading and pilot research is involved in its specification, it can only be based on a very limited selection of documents. Thirdly, the need for training coders and maintaining intercoder reliability—the true Achilles heel of the whole process as it limits both coding complexity and empirical scalability. In order for the coders to be reliably consistent in their judgements, they need to be well trained based on a uniform and unambiguous set of coding variables and instructions, which makes it necessary to keep them short and straightforward. Furthermore, as increasing the number of coders strains the coherence of the coder group and necessitates ambitious quality-control schemes, the analysis does not scale well and is hardly replicable as any future re-implementation requires re-training of the coders. Fourthly, the statistical analysis of results bound by the coding data it receives—in theory, it could lead to changes in the coding scheme and instructions, but this would require a costly re-run of most of the content-analytic process.

Being aware of the limitations of the classical approach and the advantages of topic modelling, let us quote the point of view of Monica Lee and John Levi Martin, who referred explicitly to good and bad sociologists. Quite provocatively, they stated that:

> When it comes to formal analyses, we might say that bad sociologists code, and good sociologists count. The reason is that the former disguises the interpretation and moves it backstage, while the latter delays the interpretation, and then presents the reader with the same data on which to make an interpretation that the researcher herself uses. Even more, the precise outlines of the impoverishment procedure is explicit and easily communicated to others for their critique. And it is this fundamentally shared and open characteristic that we think is most laudable about the formal approach. (Lee & Martin 2015: 24)

We take the above statement instead as forcing a discussion and a critical examination of the status of methods used in sociology, since, as Juho Pääkkönen and Petri Ylikoski (2021: 1469) have pointed out, "it remains unclear how unsupervised methods can, in fact, support interpretative work and in what sense this could be said to make interpretation more objective". Unsupervised topic modelling, which we treat as an exploratory technique, does not aim at superseding the traditional approaches to content analysis; it does, however, constitute an interesting complement to them. In terms of objectivity, it clearly does away with substantial amounts of subjectivity by way of eliminating the human readers, whose interpretative decisions prove difficult

to account, especially in the contexts of qualitative content analysis. On the other hand, topic modelling relies on a number of arbitrary choices, e.g. setting the number of desired topics or determining the values of hyper-parameters, and its results are also highly dependent on the procedures applied for text cleaning and pre-processing. Although, all those decisions are made explicit in the code script, and therefore fully replicable; furthermore, a variety of metrics exist which guide the analyst towards better choices. Yet, all this provides a framework for managing subjectivity, rather than a solution eliminating it.

METHODOLOGY

Our LDA analysis (Blei, Ng, & Jordan 2003) was performed on abstracts of articles containing the phrases "topic modelling", "topic modeling" and "topic model" in their abstract or title, which were downloaded from Scopus for the period 2000-2020. The database comprises 1,149 individual records containing the abstract and publication meta-data, e.g. citation count or author affiliation; however, the meta-data is not made available to the LDA algorithm. It can be merged with the LDA outputs at a later stage. The analysis proceeded in three distinct stages: (i) data cleaning, (ii) modelling and parameter setting, (iii) model exploration. The analysis was performed in R (R Core Team 2021), within the family of libraries associated with tidyverse() and tidytext() packages.

Since LDA requires a document-term matrix, extensive data-cleaning and pre-processing are needed for the algorithm to work correctly. Crucially, it must be noted that LDA-techniques belong to the general approach known as "bag-of-words", which amounts to treating every document as an unordered list of tokens (usually but not necessarily individual words or common phrases). Topics are defined based on the probability distribution of specific tokens within a given vocabulary.

The extent of necessary data cleaning varies depending on several factors—principally, however, on the shape and quality of the text input. Crucially, however, the cleaning and reshaping code usually remains re-usable across different projects with only minor tweaks required. Therefore, it is easy to scale up and repurpose once the LDA workflow is set up. Firstly, the data needs to be imported and initially cleaned (for instance, every Scopus abstract contains a copyright statement at the end, which needs to be erased as it leads the algorithm to seek topics based on the names of the major publishing houses). Secondly, Natural Language Processing needs to happen, which in our case involves using the Spacy library for tokenisation, POS-recognition and noun-phrase extraction. Note that after Spacy, only noun phrases are retained (based on the assumption that nominal elements of the argument structure carry the relevant information). Following the extraction of noun phrases, some additional housekeeping commences: (1) rough spell-check using Hunspell, principally aimed at unifying British and American spellings, (2) stemming of the unnested tokens in order to reduce the morphological diversity of tokens (3) removal of grammatical stop-words, e.g. "I", "where", "that", retention of common n-grams as units within noun phrases, e.g., "climate change" becomes "climate_change", (4) following ngramisation, a list of

commonly occurring personal stopwords are purged, e.g., "information" and "society" would be eliminated, but "information_society" would be retained if it proved to be a prevalent phrase.

Once the reasonably clean database is forged, it has to become a document-term matrix, where each document is a row, and each term a column, with the frequency of term-occurrence registered in every cell. The original DTM is far too sparse (i.e., contains too many low-frequency terms), and it also contains a few far too frequent terms. Sparsity reduction is required to eliminate low-frequency items—in our case, the original matrix has 1149 documents and 5142 individual terms and is more than 99% sparse, while after reduction, the DTM has dimensions of 1149 x 2024 and is 98% sparse. Finally, four omnipresent tokens were removed: "topic", "text", "public", and "topic_model". The LDA algorithm takes the DTM as input and requires the setting of several parameters, principally:

1. Hyperparameter delta—how likely it is for a token to belong to more than one topic, here we set delta at 0.01, which is moderately low.

2. Hyperparameter alpha—how likely it is for a document to be a mixture of more than one topic, here we set the initial alpha relatively low at 1.5, but we allow the model to estimate alpha further as it learns.

3. K-topic number: we tell our algorithm to find 14 topics.

RESULTS

An LDA model has two main outputs: (i) matrix beta and (ii) matrix gamma. The data analysis requires one or both of them, sometimes with metadata retained in the original abstract database. Since every document—an abstract in our case—is a mixture of topics, and every topic is a mixture of words—tokenised words after preprocessing, the beta matrix is created by extracting the per-topic-per-word probabilities for every topic/token combination. The tokens most strongly associated with each topic are featured in the faceted word clouds. Note that we already named the topics following extensive eyeballing of prominent tokens and publications associated with that topic. In naming topics, additional information was taken into account—other than the top-tokens, such as an examination of documents associated with the topic, the journals that most often publish articles associated with the particular topics, and the most prominent authors. Thus, the labels are not assigned by the model and constitute a hopefully well-informed judgement call on the part of the authors.

The other crucial model-output comes as the matrix "gamma", i.e., document—topic associations. The gamma value is essentially an estimate of the proportion of words from that document that belongs to the particular topic. Gamma is estimated for every document—topic pair; however, our alpha setting of the LDA hyperparameter pushed the algorithm towards looking for one dominant topic in every document. While multi-topicality is possible, even within the specific prose genre of article abstracts, we direct the model against pluralistic assignments for two reasons: (i) an abstract is a short-form document that is usually about one major topic, unlike, for instance, the

full-text article which contains a mixture of topical threads, (ii) much of our further analysis relies on selecting the "top_topic" of a document so for most purposes the multi-topical assignment of probabilities would be lost anyhow. In any case, this is a judgement call, and we calibrated the algorithm in this particular way after many attempts at modelling.

The fourteen topics identified and the main keywords are shown in Figure 1. At first glance, it is clear that the topics are diverse, but none of them include "sociology" or "sociological analysis" among the main keywords. In fact, the token "sociology" features only 41 times in the whole corpus. However, looking at the content of the topics, it is easy to identify issues that fall under the areas of specific sociologies (e.g. T2., T3. or T9.). A brief analysis of the documents most strongly associated with these three topics suggest, however, that they are typically conducted within other disciplinary frameworks. It seems indicative of the hitherto low level of engagement of sociological research with the novel methodologies of topic modelling. Further support is rendered to such a general observation by the examination of the most prominent journals publishing articles associated with the identified topics (see Table 1).

Figure 1. Main topics within the topic modelling

Source: own elaboration.

The overall picture of existing uses of topic modelling suggests a strong diversity of interests. Some topics include specialised issues of data analysis using various machine learning algorithms methods (T4., T6., T13., as well as T1. and T6.), and others—detailed issues of new network technologies. Still, others are connected with customer services (T8.), transportation issues (T14.) or social media analysis (T7.).

Cluster analysis of the selected topics is presented in Figure 2. It clearly shows how some topics are connected to each other (e.g. T4. and T6.), while others are more separate entities (e.g. T9. or T7.). Note that the hierarchical clustering of topics is performed on data derived from the gamma-matrix, i.e., degree of association of each document with every topic. The most fundamental distinction occurs between the bottom five topics on the dendrogram, which broadly relate to methodological interests, and the other nine topics, which demonstrate more substantive concerns with specific knowledge domains.

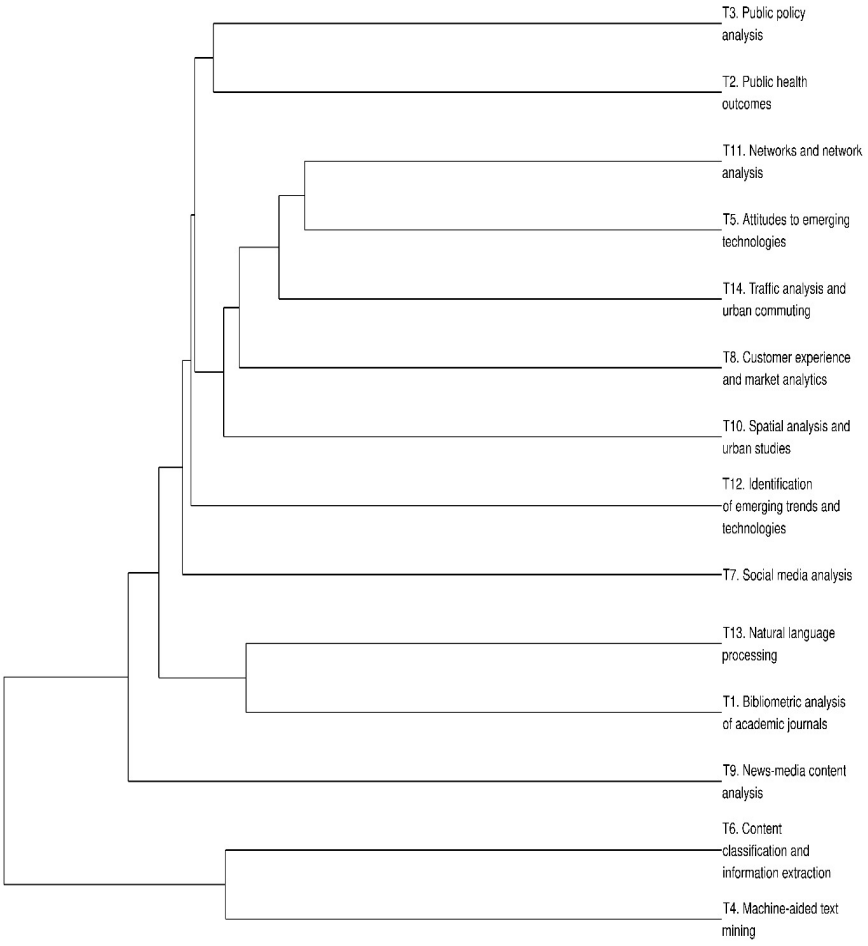

Figure 2. Cluster analysis dendrogram of main topics.
Source: own elaboration.

Apart from exploring the relationships between different topics, which can also be performed using more powerful classification techniques, it is also helpful to look inside the topics. Thus, a secondary LDA can be performed to identify micro-topics

within the documents most strongly associated with each of the macro-topics. Figure 3 provides a snapshot of such an exploration. Notably, as implemented here, the analysis takes a number of analytic shortcuts—most importantly, all macro-topics are assumed to contain exactly eight micro-topics. It would be likely better to allow for macro-topics to have a variable number of micro-topics and make provisions for individualised hyper-parameter settings. Such an individualised approach would nevertheless require substantial manual data analysis within our current framework. Since secondary data users typically prefer analytic solutions which require minimal data-collection efforts on their part (Jabkowski, Cichocki, & Kołczyńska 2021), a one-size solution constitutes a preferable option to a manually tweaked one. The setting of secondary LDA parameters could be automatised in principle, but we have not yet achieved practically applicable solutions in this respect.

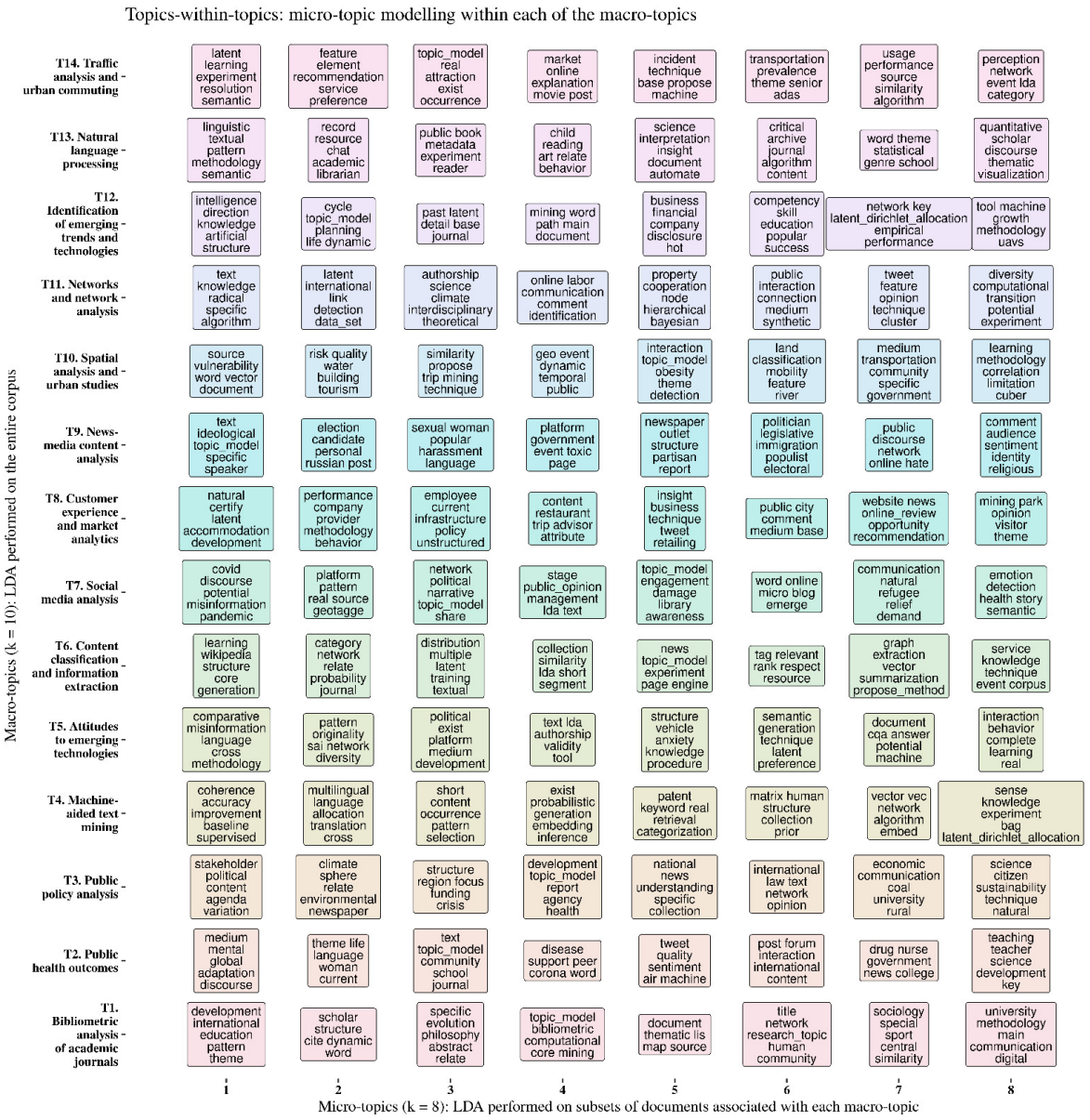

Figure 3. Secondary LDA: micro-topics within macro-topics.
Source: own elaboration.

Topic	Journal
T1. Bibliometric analysis of academic journals	*Journal of the Association for Information Science and Technology, Journal of Consumer Research, Cognition, International Journal of Communication, Environmental Sociology*
T2. Public health outcomes	*Global Environmental Change, Journal for Research in Mathematics Education, European Societies, Scientometrics, Journals of Gerontology –Series B Psychological Sciences and Social Sciences*
T3. Public policy analysis	*Policy and Society, Sustainability, Communication Methods and Measures, Policy Studies Journal, Journal for the Scientific Study of Religion*
T4. Machine-aided text mining	*Information Retrieval, Scientometrics, Topics in Cognitive Science, Communication Methods and Measures, Journal of Information Science*
T5. Attitudes to emerging technologies	*Political Analysis, Information Processing and management, Social Science Computer Review, Transportation Research Part A: Policy and Practice, Decision Support Systems*
T6. Content classification and information extraction	*Information Processing and Management, Decision Support Systems, Scientometrics, Synthesis Lectures on Human Language Technologies, Information Retrieval*
T7. Social media analysis	*Decision Support Systems, Computers, Environment and Urban Systems, International Journal of Information Management, Journal of Information Science, Digital Journalism*
T8. Customer experience and market analytics	*International Journal of Information Management, Tourism Management, Journal of Service Research, Decision Support Systems, Social Science Computer Review*
T9. News-media content analysis	*American Journal of Political Science, Political Analysis, Information Communication and Society, Political Behavior, European Journal of Cultural and Political Sociology*
T10. Spatial analysis and urban studies	*International Journal of Geographical Information Science, Computers, Environment and Urban Systems, Cartography and Geographic Information Science, Transportation Research Part C: Emerging Technologies*
T11. Networks and network analysis	*Journal of Informetrics, Decision Support Systems, Scientometrics, Journal of the Association for Information Science and Technology, Resources Policy, Review of International Organizations, Social Science Computer Review*
T12. Identification of emerging trends and technologies	*Information Processing and Management, International Journal of Engineering Education, Migration Studies, Futures, Telecommunications Policy*
T13. Natural language processing	*Digital Journalism, Poetics, Digital Scholarship in the Humanities, Administrative Science Quarterly, Government Information Quarterly, International Journal on Digital Libraries*
T14. Traffic analysis and urban commuting	*Transportation Research Part C: Emerging Technologies, Accident Analysis and Prevention, Computational Linguistics, Tourism Management, Journal of Air Transport Management*

Table 1. Topics and key journals
Source: own elaboration.

Modelling micro-topics within the fourteen macro-topics serves two main goals: (1) investigation of the macro-topic coherence, (2) exploration of the within-topic diversity of interests. The former use is methodological and may be deployed to evaluate the quality of macro-topics. Thus, it complements other measures of model fit, e.g., topic coherence or model perplexity, as well as those of manual inspection, e.g., a review of top documents or top tokens. In this methodological use, the tool is most restricted by the above mentioned fixed topic number and parameter settings for the micro-topic modelling. However, it seems to work best as a snapshot of discourse, allowing an inspection of topic diversity at a glance. Such an approach best fits exploratory studies, which aim to gain quick insights into an unknown body of text. For instance, the algorithms deployed here to study abstracts mentioning "topic modelling" could easily be re-purposed to analyse abstracts relating to any other research domain. Even a cursory examination of the micro-topics points to the existence of meaningful micro-topics. For instance, within T.7. Social media analysis there are several recognisable themes: T.7.1. "Covid pandemic (mis)information", T.7.3. "Network dissemination of political narratives" or T.7.7. "Communication patterns of refugees".

As mentioned above, the LDA algorithm does not have access to any of the publication meta-data—modelling only involves document ids and abstract texts. However, once the documents are classified as belonging to any particular topic, this information can be merged with the available meta-data. For example, it is possible to determine which journals provide the most prominent publications within each topic. Detailed information on the journals assigned to the particular topics can be found in Table 1. As can be seen, topics have a heterogeneous representation of journals, which means that topic modelling itself is used in different journals assigned to specific disciplines. Looking from another perspective, although there is no "sociology" in the keywords, as we pointed out above, there are sociology (and multidisciplinary with sociology) journals in which the machine learning algorithms of topic modelling are applied (cf. *Environmental Sociology*, *European Societies*, *European Journal of Cultural and Political Sociology*, *Migration Studies*).

CHALLENGES AND LIMITATIONS

When considering the role of topic modelling within the development of sociology, which to explain social reality increasingly conditioned by digital technologies must develop adequate methods of analysis, one cannot ignore the diversity of methods of analysing large corpora of data as their weaknesses. This paper is based on an implementation of LDA (Blei, Ng, & Jordan 2003), but there are also other established alternatives (Bohr & Dunlap 2018). Table 2 provides a brief discussion of four topic modelling methods along with their limitations.

Name of the methods	Characteristics	Limitations
Latent Semantic Analysis (LSA)	LSA can get from the topic if there are any synonym words. Not robust statistical background	It is hard to obtain and to determine the number of topics. To interpret loading values with probability meaning, it is hard to operate it.
Probabilistic Latent Semantic Analysis (PLSA)	It can generate each word from a single topic; even though various words in one document may be generated from different topics. PLSA handles polysemy.	At the level of documents, PLSA cannot do probabilistic model.
Latent Dirichelet Allocation (LDA)	Need to manually remove stop-words. It is found that the LDA cannot make the representation of relationships among topics.	It becomes unable to model relations among topics that can be solved in CTM method.
Correlated Topic Model (CTM)	Using of logistic normal distribution to create relations among topics. Allows the occurrences of words in other topics and topic graphs.	Requires lots of calculation. Having lots of general words inside the topics.

Table 2. The characteristics and limitations of topic modeling methods

Source: Alghamdi & Alfalqi 2015: 150–151.

The LDA example shows that the listed characteristics and limitations are neither complete nor definitive. For example, the need to manually remove stop-words remains a problem even after advanced pre-processing. The high-frequency stop-words are not a problem, i.e., for most common languages, there are well-researched dictionaries available. Domain-specific stop-words may prove challenging. For instance, when dealing with academic abstracts, it seems reasonable to exclude such common words as: “paper”, “study”, “article”, “issue”, “research”, “analysis”, “finding”, “approach”, “author”, “program”, “review’ or “chapter”. Such words constitute a common occurrence in abstracts, regardless of their topic. On the other hand, there are common methodological words as “logistic”, “regression”, “multilevel”, “hypothesis”, or “regression_model”; they also are omnipresent in academic abstracts regardless of their research interests, it could be argued that this particular set of tokens would indicate that the underlying research is quantitative. Hence, the precise set of stop-words remains of the author’s making and usually involves multiple trial-and-error iterations. For more information on the limitations of topic models, those interested can find quite a lot of literature on the subject (Arabshahi & Anandkumar 2016; Blei & Lafferty 2006; Ding & Jin 2019; Lee, Song, & Kim. 2010).

CONCLUSIONS

The use of value-laden categories (cf. Gans 1999: 268; Rex 1983; Weber 1949) to evaluate sociology has, on the one hand, a heuristic dimension aimed at drawing attention to the problem of the quality of sociological research rather than the normative evaluation of the discipline as a whole. However, on the other hand, a “good” sociology primarily describes and explains, and to a lesser extent predicts, the functioning and

changes of society. A "good" sociology allows us to see the invisible or to explain the known in a different, often non-intuitive way. "Bad" sociology, on the other hand, is not sociology based on coding (as stated by Lee & Martin 2015), but an approach that is unable to diagnose and explain social reality. In this view, topic modelling based on LDA, although it has limitations of (i) applicability and of (ii) a methodological nature, enriches the sociological approach by enabling the analysis of large textual datasets that would not be possible without this method (DiMaggio, Nag, & Blei 2013: 577). It constitutes a relatively easy to use method for investigating textual Big Data, which remains difficult or impossible to grasp through traditional empirical approaches.

Additionally, "good" sociology using topic modelling can serve as, on the one hand, a novel method of literature review, initiating further research using "classical" research methods. Principally, it can serve as a discourse-mapping tool, identifying areas of interest and potential coding schemes for more conventional analysis. As it can be deployed rapidly at scale, it seems to constitute a good fit for meta-analyses of literature and exploratory summarisation of prevailing trends. One such ready opportunity exists in the form of secondary LDA (LDA-within-LDA-results), which has been demonstrated in this paper. On the other hand, LDA can be deployed as a fully holistic research method both on its own and in conjunction with other meta-data (e.g., monitoring topic prevalence over time, tracking funding sources for particular research streams, or investigating publication patterns). Such research opportunities were demonstrated in this paper, as we identified which journals publish most prominently within each of the identified macro-topics.

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SUPERVISION FOR ADVOCACY: SUPPORTING SELF-CARE

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ABSTRACT: The objective is to examine the intersection of advocacy for social change, the individual's emotional costs of advocacy, and the use of trauma informed care in supervisory practice to encourage and support advocates and their work. Supervision models exist, but none address the needs of advocates who might become targets for scorn and persecution. The literature on trauma informed care provides a direction to improve the support and supervision of advocates, especially those who use their personal experiences as examples in their work. We reviewed data bases and relevant literature regarding supervision and the principles of trauma informed care. Periodical literature was reviewed for examples of those affected personally and professionally by their advocacy efforts. Review of the literature revealed little new knowledge on social work supervision but provided a base to apply the principles of trauma informed care to support and encourage advocacy for social change. This paper suggests the use of trauma informed care in supervisory relationships and advocacy work. This is an original approach to encourage and uphold advocates in difficult times.
KEYWORDS: Social work, social identity, trauma informed, reflective supervision

INTRODUCTION AND OVERVIEW OF SUPERVISION

One way to begin our topic is to clarify what we mean when we use the term "supervision". Bernard and Goodyear described supervision as an intervention provided by a more senior member of a profession to a more junior one of that same profession (2004). As in intervention, supervision becomes a tool with an established beginning, middle, and end; it can continue over time and can be focused on a set of specific outcomes and indicators. Used as an intervention, supervisory relationships are intentional and can be evaluated using various indicators and outcomes. Supervision takes place at various levels in the United States and involves students in training, young professionals seeking licensure, mid-career professionals, and mature experienced professionals. Supervisors who are entrusted with students and interns are responsible for socializing these trainees into the values and skills of the profession. These supervisors often find themselves serving as gatekeepers for the profession by differentiating between those students who perform well and those who need remedial work prior to graduation. Student supervision can provide professional fulfillment and an outlet for creativity and interests, as well as a feeling of adding to the growth of the profession. Supervisory intervention helps to enhance the skills of emerging practitioners, to ensure provision of high quality service to clients, and to prepare the emerging practitioners for successful licensure. Licensed professionals can then move into a supervisory role as well as participate in peer supervision with senior colleagues. Among licensed professionals, supervision is often more collegial as opposed to having any authority or responsibility for performance. Client outcomes and service quality remain the goals of supervisory practices at any level.

Supervisors play a number of roles within their organizations, among their staff, and within their professions (Bernard & Goodyear 2004). Supervisors are engaged in furthering the goals of the agency as well as improving programs and services. They may be active in advocacy and governance roles in addition to the supervisory tasks with students and interns. There is a tension between the pleasurable aspects of educating and guiding students and junior colleagues and the demands of other supervisory roles. Budgets, resources, deadlines and other demands on a supervisor's time and energy can seriously impinge upon the relationship between the supervisor and the supervisee. There can be less time and fewer resources to spend on supervisory tasks, as inviting as they may be, when additional time and attention are needed to address the needs of emerging professionals. Many of these supervisory demands are associated with the dictates of agencies and bureaucracies, so diverse forms of social work supervision were developed across different countries and social welfare systems (Wonnacott 2011; Grewiński & Skrzypczak 2014). The conflict between conservative (managerial) and critical social work approach is discussed by many authors (see Timor-Shlevin & Benjamin 2021). In addition to an increased role of critical social work and awareness of the role of oppression in today's society, it is clear that traumatic experiences are prevalent among those served (Anda et al. 2006). As a result, special trauma informed care was developed in the past twenty years to meet the needs of those who struggle (SAMHSA 2014). This care is needed by both the clients

who come to us in need and the social workers who serve them.

One of the realities of student and intern supervision is that many full time students from small, homogeneous communities enter the field with little real life experience and limited exposure to cultural diversity. Before introducing these students/interns to the scope of practice, supervisors often must address the need to clarify personal versus professional values and to explain and model the basic principles of professional boundaries and the therapeutic relationship. For those students/interns who have had experience, supervisory tasks include addressing the need to move beyond a model of practice used in a prior agency position and to improve and diversify skills. While supervisory tasks can always create challenges of time and resource management, the impact of the COVID19 pandemic on service systems increased these challenges. Supervisors must constantly balance between their duties to the organization, to their staff and clients, to their profession, and to their students/interns.

In most states in the United States, once a social worker has achieved the master's level license, the law requires annual continuing education. Continuing education classes can help a licensed professional to earn the supervisory designation to their license, which then will require courses in supervisory theory and skills for license renewal. Social work agencies may also offer courses and training in supervisory practices to ensure a high quality of supervision for the agency staff. It is still the norm, however, for supervisors to be "eased" into the role without much formal training or education, other than the model of supervision experienced early in their own training. In contrast, there is specific training in Poland for the role of supervisor, and the function of supervision appears to be more consistent with a specific role designation than it is in the United States (Ministerstwo Rodziny i Polityki Społecznej 2021).

Research on supervision has been growing, but there are limitations given the nature of the topic. For example, research on supervision is conducted in a wide range of settings: business, health care, education, social work, and psychology. While there may be similarities among these supervisory situations, surely there are also differences. Much of the literature is self-report and therefore open to social desirability bias. Correlational designs are common even though the nature of supervision would be amenable to longitudinal designs. Measures tend to be perception/satisfaction ratings instead of objective measures and performance outcomes. In spite of these limitations, research has shown what characteristics are most highly rated among those deemed effective or competent supervisors (Marino 2011). In general, those deemed as effective or competent supervisors actively balance the competing roles: efficient administration; supportive responses to staff; up to date, relevant training and education; and involvement in advocacy and professional goals. Students/trainees highlighted the role modeling they saw in their supervisors, noting their availability and flexibility, openness to new ideas, and ability to demonstrate as well as discuss specific skills. Supervisors were seen as more competent when they offered constructive criticism in the context of a supportive relationship. Worthen and McNeil (1996) found that non-judgmental, validating behaviors enhance a supervisee's experiences. Barnett (2007) discussed the role of a safe environment which provides supervisees the opportunity to openly share ideas, concerns, and fears as well as to take some risks

and try a new skill. In the words of Lawrence Shulman, competent supervisors are experts in encouraging work while reducing resistance (Sewell 2018).

Of the three basic functions of supervision—administration, education, and support, administration is usually the least favorite and support the most needed (Berger & Quiros 2014, O'Donoghue et al. 2018). These two mentioned functions are often in conflict as it is challenging to support someone who at the same time may need administrative coercion. Very often administrative supervision helps an institution to maintain professional structure and compliance. However, there is an inherent conflict between respecting institutional rules and responding to a changing environment. If the role of a social worker is to be a leader and a change agent, then social workers should study the ever changing needs of their clients and routinely suggest appropriate policy and program modifications. Often, change meets with institutional resistance and requires special leadership skills to make the necessary reforms. The challenges confronting social workers in the twenty-first century make plain the need for changes in how we supervise and support those most critical to providing care (Vito & Schmidt Hanbidge 2021).

Most of the literature concerning social work supervision in advocacy work involves issues that can be discussed during a regular supervisory meeting. During such meetings, a supervisee discusses how the well-being of their clients can be improved by advocacy action at the organizational level or on a more macro level such as city, state, or federal (Glosoff & Durham 2010; Asakura & Maurer 2018). In her work, McLaughlin (2009) mentioned three types of advocacy: instrumental, educational, and practical. In instrumental advocacy the social worker's action is at the level of systems responsible for the policies discussed. Educational advocacy informs others about the social problems that need to be addressed and suggests how these problems can be resolved. Educational advocacy is perhaps the kind that is most visible to the public. In practical advocacy the social worker is personally involved in activities on behalf of their clients.

Advocacy activities may take the form of political engagement including running for office. United States Senator Barbara Mikulski exemplifies this approach (Romaniuk 2013). Another form of political engagement is participation in demonstrations in front of the public and/or government offices or getting involved in different street protests and marches. Interestingly, most of the research papers concerning political engagement are published by specialists in the study of economics, public health, or anthropology. There are not many mentions of the supervisors of social workers engaged in political advocacy or setting an advocacy example for supervisees through political engagement.

THE IMPORTANCE OF SELF-CARE IN SOCIAL WORK PRACTICE

The COVID-19 pandemic ushered in a renewed focus on self-care for social workers. In response to the pandemic stressors, the National Association of Social Workers revised the professional code of ethics to include explicit language on the role of self-care in ethical practice. The purpose of the code of ethics was amended in 2021 to read

as follows:

> Professional self-care is paramount for competent and ethical social work practice. Professional demands, challenging workplace climates, and exposure to trauma warrant that social workers maintain personal and professional health, safety, and integrity. Social work organizations, agencies, and educational institutions are encouraged to promote organizational policies, practices, and materials to support social workers' self-care. (NASW 2021)

The presence of self-care in the professional code of ethics elevates the concept to a value and principle of social work practice, much more than a recommendation or suggestion for practice. All social workers should now employ self-care strategies in both their professional practice as well as in the personal lives in all practice settings and all scopes of practice. The elevation of self-care logically is extended into the arena of supervision and foreshadows the use of reflective approaches for the supervisor to value and to model as well as to teach self-care to students and staff members.

Many authors concerned with the well-being of professionals who deal with social justice issues stress the importance of empathy in mental health services. It is important to be able to use compassion while advocating for vulnerable and marginalized populations. An especially interesting method of building emotional resiliency and empathy for clients is the method of Schwartz Rounds (Farr & Barker 2017). This method refers to a special meeting of professionals who meet to discuss emotional, social and personal issues associated with client care. This intentional inclusion of emotional and personal issues can increase the amount of support offered to all involved in difficult care situations. Trauma-informed care is a logical next step in the discussion of the significance of self-care in social work practice (Knight 2013).

TRAUMA INFORMED PRACTICE (TIC)

Anda and coworkers (2006) found that among people who struggle with physical and mental health problems, there is a significant number who experienced traumatic events as children. Often, they first report health problems many years after the trauma experience, so the link between trauma and health impacts was overlooked. The studies that followed on the neurobiology of trauma and chronic stress in childhood confirmed a causal relationship between traumatic events and health problems later in life. The prevalence of adverse childhood experiences (ACE) created a new approach to health care in general. The subsequent studies showed that the number (score) of ACEs in someone's life can be a risk factor in developing different physical and mental health disorders. These results prompted a new approach in health care to create medical services that are informed by our knowledge of trauma. One of the primary attributes of this approach is to avoid re-traumatization while seeking help. Another central attribute of a trauma-informed approach is that all medical personnel must be trained in the effects of trauma on well-being. The physical structure, as well, has to be safe and accommodating of patients who may struggle from different forms of trauma (SAMHSA 2014).

According to SAMHSA (2014), there are six guiding principles of trauma informed care (TIC): safety; trustworthiness and transparency; peer support and mutual self-help; collaboration and mutuality; empowerment voice and choice; and cultural, historical, and gender issues. Although the goal of creating a trauma informed approach to health care is well documented, it is still more an idea than established practice in many service settings (Sweeney & Taggart 2018).

REFLECTIVE AND TRAUMA INFORMED PRACTICE

In general, during traumatic events people lose control over their choices or bodies. For people who were traumatized, any inequality of power may create conditions that could be re-traumatizing. This is why social workers need to know the characteristics of their client populations and why their supervisors have to be knowledgeable about the possibility of a history of trauma among both clients and supervisees. In a hierarchical institution, where a supervisor has control over the career of a supervisee, the inequality of power is inherent to the system. In trauma informed practice the goal is the collaboration with each staff member having equal power. In supervision, with the administrative role of a supervisor, such equality is difficult to achieve (Hair 2015; Berger et al. 2018). However, there are ways to accomplish a greater degree of equality. For example, a supervisor may suggest completing a certain assignment by supervisees and discussing with them how they approach and carry on the project. They can use their roles as educators and supporters, encourage critical thinking, and facilitate an introspective approach through asking questions instead of offering solutions to problems. This method is well known as reflective practice and is especially recommended when there is a need to learn about the problem that practitioner encounters (Cameron 2009, Grewiński & Skrzypczak 2014). In reflective supervision, usually both the supervisor and supervisee can reflect on their part of the relationship. Instead of giving a lecture, the supervisor may ask questions and discuss the supervisee's ideas, while underscoring observed strengths and skills of supervisee (Kinman & Grant 2017; Varghese et al. 2018).

There are significant similarities between the model of reflective supervision and trauma informed supervision. Years of practice in the fields of child welfare, children's mental health, and education led to the development of reflective supervision meant to educate practitioners on how to develop an effective relationship with parents and children (Perkowska-Klejman 2012). Instead of a hierarchical, one-way affiliation between supervisor and supervisee, it was established that a more egalitarian, two-way relationship better served those who work with families and children. The goal of this relationship was to model an open and trusting relationship between a practitioner and a client. A core function of their supervisory alliance was a reflective inquiry of practitioner performance. Using questions concerning both objective case presentation (what happened) and subjective practitioner feelings and believes (reactions vs. educated responses), the supervisor and supervisee can create safe space to learn and discuss the best intervention in a client's life. Years of this application of reflective supervision allowed for the development of evidence based practices that can be used

in a much more recent model of trauma informed care. There are many resources to learn how to apply the best practice guidance for the reflective supervision. For example, the program Multiplying Connections created by the Health Federation of Philadelphia (2018) is often cited as a resource for building reflective and trauma informed supervision.

Trauma informed care seemingly adopted reflective supervision as the method of communication between supervisor and supervisee (Varghese et al. 2018; Romaniuk 2021). In 2017, Rankine from the University of Auckland presented a theoretical model for reflective supervision pointing out four different layers of practice: individual, organizational, relational and socio-political, and socio-cultural. Since asking questions is the most important part of this approach, we present examples of inquiry of each of the forth levels based on Rankine's work. At level one representing practitioners, the supervisor can ask how their cultural background may affect how they present the case report. How does the information they have learned correspond with their professional role? Can they see the situation differently, and how might this affect their actions? At level two, the organizational level, the supervisor may ask how the goals of their organization may affect practitioners' decisions concerning their intervention and with whom from the organization they can collaborate. Through these questions supervisees may recognize what assumptions concerning their employment are taken-for-granted and how to challenge them if necessary. On the third relational level, practitioners analyze their relationship with a supervisor as it serves as a base for any other relationships within their profession. They analyze their value system and their abilities to be open, honest, and empathetic. The practitioner is guided to recognize the system of power and control to be able to acknowledge that some people use their privileges at work whereas others are silenced because of their group vulnerability. The understanding of the role of power in organizational hierarchy may help in a search for equity and justice for both employees and the people that are served. Developing sensitivity in recognizing the role of power and privilege in social organizations is especially useful at the fourth level of practice, socio-political and socio-cultural context. Working with different populations of people with diverse socio-cultural backgrounds requires professional humility and an openness to experience different conditions of human existence. A supervisor may ask questions concerning the dominant culture and the messages that people receive from those in power. Practitioners may have to critically question their own beliefs and values concerning other people's needs and problems.

In the constantly changing environment of social work practice, it is difficult to apply well-established techniques and methods to serve people in need. Sometimes, the needs presented are separate from the real source of the problem. This is especially true in helping people with generational poverty, trauma, and oppression. For example, they may reveal problems with parenting or a marriage while the source of the problem may extend to the specifics of the underserved community that they came from. Reflective practice, as designed in 1983 by Donald A. Schön (see Cameron 2009), is a technique of learning about the needs of people that can be poorly recognized by social science professionals. There might be different reasons for insufficient knowl-

edge: the social problems may be new or they may be the result of recent political and economic changes. What practitioners are subjected to might be related to unknown historical, cultural, and social conditions to which their clients have been exposed. Through the method of "reflecting in and on practice", a professional may gain new information. The technique of critical inquiry is helpful with the new approach of trauma informed care especially when the presenting problem is often separated from its real cause.

TRAUMA INFORMED SUPERVISION

Trauma informed care is not trauma therapy. It is an approach that is sensitive to the history of trauma in peoples' lives. Very often people who are looking for help do not want to address their history of trauma; rather, they want to talk about recent events in their lives. Only trained professionals may connect present difficulties with past history. This is why it is advised to ask for any possible events in the client's life that happened before the present difficulties to evaluate the possible triggers of current emotions and behaviors. There are different mental health problems that can be evoked by trauma. They are often related to low self-esteem and can lead to self-harming behaviors such as cutting and alcohol and drug abuse. People who experienced traumatic events in their childhood may develop eating disorders, different forms of somatization, and dissociative identity disorder. Mood and stress-related disorders are common (Knight 2018).

Social workers who work with people who have experienced trauma are exposed to hearing stories that affect their emotional well-being and may lead to experiencing vicarious trauma, secondary traumatic stress, or compassion fatigue, all of which can lead to burnout. These three different phenomena may have detrimental effects on a social worker's ability to thrive. The role of the supervisor is to observe any risk factors that may lead to those effects of trauma and recognize when a social worker may already be manifesting symptoms. Both forms of indirect trauma such as vicarious trauma and secondary traumatic stress have similar symptoms to post-traumatic stress disorder (PTSD). In the case of compassion fatigue, the clinician develops difficulties empathizing with the client, especially if there are problems with communication during therapy. To be better prepared to work with trauma survivors, social workers and other professionals need to practice self-care and build their own resiliency (Knight 2013; Butler et al. 2017; Kinman & Grant 2017).

It has been recognized that when an institution follows the guidance of TIC, it reduces the manifestation of indirect trauma among professionals. One of the methods to introduce a TIC approach to the present system is to extend the TIC principles to the supervision of social workers and other professionals (Romaniuk & Farkas 2021). Supervisors play a significant role in the implementation of TIC principles in their work with supervisees. As educators, they are able to explain the impact of trauma in a client's life and connect today's problems (such as addiction or homelessness) with the history of trauma. Supervisors may, in some instances, recognize the impact of previous trauma among staff. A supervisor may notice a pattern of avoidance on

certain topics and then bring awareness to such issues through reflective discussion (Knight 2018). Reflective practice recognizes that a history of traumatic experience may affect the willingness of "using of self" in supervision (Ferguson 2018). A trusting and egalitarian supervisor-supervisee relationship in TIC may lead to less avoidance of reflection on difficult experiences.

A supportive relationship with a supervisor is also a form of self-care (Glassburn at al. 2019). A practitioner may experience stress from several sources, and the cumulating effect in everyday life can be overlooked. Professionals may blame themselves for coping poorly with challenges and push themselves to overcome the obstacles. Reflective supervision may help them recognize the stress they experience and analyze the best interventions to resolve their problems. Knowledge about the role of traumatic experiences in people's lives may help a supervisee to make the connection between present emotions and past stressors. This deep self-analysis will benefit their future work with others as it helps them to develop a better understanding of other people's struggles. Such supervision can lead to acquiring routines of self-reflection and to the recognition of warning signs for stress-related problems. Supervisors are in a role to suggest that a practitioner might include mindfulness techniques and other forms of body-oriented practices as part of self-care (Richards et al. 2010). A supervisor's modeling of self-care and supportive engagement may help a supervisee to avoid negative effects of trauma and, similar to clients' posttraumatic growth; a supervisee may experience "vicarious posttraumatic growth" that manifests in a better appreciation of their professional skills and abilities (Knight 2018).

The six principles of TIC may serve as guidance to any discussion between supervisor and supervisee. For example, the principle of safety underlines the importance of a safe place for open and honest discussion of all aspects of the supervisee's issues related to their work. Supervisees need to feel accepted and understood. The boundaries of the relationship and expectations concerning the relationship should be clear yet flexible (Knight 2018). The principle of trustworthiness and transparency encourages curiosity about the possibility of a supervisee's underlying history of trauma in responding to a client's present problems. The supervisor may bring the context of trauma to their conversations. Cultural, historical, and gender issues cannot be ignored. Social workers may deal with a diverse population of clients, and so they need to learn about the specificity of each group as a part of their cultural education. By the same token, the impact of culture, history and gender issues in the supervisee's and supervisor's lives are important. Some topics, due to the history of racism, sexism, homophobia and other forms of oppression, might be more difficult to bring into open discussion (Berger et al. 2018). However, to be honest and open, transparent, and trustworthy, a supervisor may address how diverse experiences affect the therapeutic relationship. Similarly, if there is a cultural difference between supervisor and supervisee, the differences in identity and cultural background should be discussed and how those differences could affect their relationship. Varghese, Quiros and Berger (2018) suggested using specific tools for culturally competent trauma-informed supervisors. These tools include locating oneself; engaging in dialogue; suspending judgments; identifying biases, and assumptions; and reflection and inquiry. Locating oneself, a

self-assessment of one's own social identity, is a process of finding out how one social identity interacts with another person's identity, understanding their historical meaning and biases. Engaging in dialogue means maintaining an open discussion and sharing feelings and opinions; deep listening means listening to others and to your own reactions, your own belief system and gut feelings. Suspension of judgements refers to noticing your own judgement and try to see reality that is not changed by your judgement. Finally, after recognizing biases and assumptions, both people in supervision reflect on the process and what they learned from it to develop more questions relevant to the findings (Varghese et al. 2018). Throughout the entire process, the power imbalance is addressed and minimalized according to principles 3-5 of TIC (Berger et al. 2018).

A good example of the relevance of trauma informed supervision is in addiction treatment. There is a reciprocal cause-effect relationship between trauma and substance abuse: people who experience trauma often develop addiction and people who are under the influence of mind- altering substances exhibit behavior that is prone to traumatic occurrences (Jones & Branco 2020). Due to the complex nature of problems in addiction treatment, the social worker's role is very demanding (Litwa-Janowska 2017). Clients often do not recognize their own progression of disorder; they resist change and do not trust the therapeutic process. Due to challenging work conditions, addiction social workers and counselors obtain the highest number of ethical violations compared to other professionals (Jones & Branco 2020). With the higher stress at work, there is a greater demand for supervision in addiction treatment. While addressing clients' trauma, counselors may develop indirect trauma that should be elaborated on during supervisory sessions. Jones and Branco (2020) gave an example of a case study that can be discussed using the six principles of TIC as guidance. This kind of supervision helps the whole institution to apply TIC rules.

ADVOCACY FOR SOCIETAL CHANGES

One of the core values of social work practice in the United States is social justice; social workers challenge social injustice (McLaughlin 2009). Issues of equity and fairness are salient in today's society. People, in general, and students, in particular, are concerned about social justice and wish to take an anti-oppressive approach to history (Hair 2015; Knight & Borders 2018) and, more importantly, to change how society works. There are social workers who see themselves as peaceful participants in the incremental transformation of a long-established system and others who demand more immediate change through political protests and demonstrations. There is a power struggle between a new and an old social order and a spectrum of views reflecting today's political and social conflicts. A change agent may experience different levels of institutional resistance, from relatively smooth policy debates to violent street confrontations with the police. The requirements of social justice often conflict with the realities of political power. Those who challenge and resist political power may pay a significant price for their beliefs.

Social workers, by nature of their professional values, must understand the effects

of collective injustice in shaping today's society. The history of oppression and transgenerational trauma are topics that social workers cannot avoid (Knight & Borders 2018). If the professional obligation to pursue social justice puts social workers in conflict with the law or otherwise endangers them, then there must be avenues to offer professional support for such situations. By design, the most appropriate support should be offered by social work supervision. However, not many social workers have ever been trained for such a role (Hair 2015). In fact, many organizations would rather train their employees how to follow their policies than motivate them to question their traditions. Social workers who seek to change society and to publicly address inequalities and inequities may suffer traumatic abuse and derision as a result of their advocacy. A greater understanding of the application of trauma-informed principles will help us to develop further guidelines for supervisory skills that will encourage advocacy and increase support to those who take overt, public steps towards social change.

SUPERVISION AND EDUCATION OF SOCIAL WORK STUDENTS

In addition to education, students of social work also need supervision for their practice. They can be exposed to the effects of trauma on peoples' lives during their field placements (Tarshis & Baird 2019) and during classwork at a time when global events create political trauma (Sondel et al. 2018). Tarshis and Baird (2019) presented a good example of field placement supervision in Intimate Partner Violence (IPV) practice. There is a need to teach students how to develop resilience to the experience of indirect trauma while working with clients in an IPV setting and to recognize that trauma my affect them at different environmental levels. To do that, the authors (Tarshis & Baird 2019) used both a TIC approach and ecological framework. In the ecological framework, students learn about the effects of trauma at personal, relational, community, and system levels. On the personal level, students consider their psychological vulnerability to indirect trauma. Depending on the students' past history of trauma, they may have different emotional skills in dealing with clients' history of abuse and suffering. Because of their predispositions, students are advised to self-assess their reactions to the stories they hear of clients' lives. In terms of relationships, students are encouraged to openly discuss their practical experiences with supervisors and to observe how their relationships improve when they are building mutual trust (Knight 2013). The supervisor may address cases of countertransference, when students describe their emotional responses to clients' stories. At the community level, students are trained to work in the environment where people are affected by traumatic events. Supervisors have weekly or bi-weekly meetings with students to assure that students have the necessary support in their practice. They empower students to exercise their own voice and choice concerning working with clients. At the systematic level, students participate in a learning process concerning the destigmatizing of trauma survivors individually and organizationally. They are educated about the role of racism, sexism, and different kinds of oppression on people from different social groups and about the transgenerational transmission of trauma. Supervisors may empower stu-

dents to be engaged in global events that affect their population of clients or their own community (Mapp et al. 2019; Tarshis & Baird 2019).

Sondel, Baggett and Dunn (2018) discussed how certain global political events may traumatize large populations of people. Students of social work, due to their mission to help those who cannot help themselves, are vulnerable to many forms of political trauma. Taking as an example recent political events in the United States, the authors voiced the opinion that educators cannot minimize or dismiss obvious demonstrations of systemic oppression while teaching young people. Students need to be empowered to question authorities and get involved in civic action to defend their values and their sense of justice and equality. A similar conclusion can be found in the work of Swanson and Szymanski (2020) concerning the #MeToo Movement. They concluded that activism may help survivors of sexual assaults to heal from their traumatic experiences. However, they also emphasized that many activists experience emotionally challenging incidents for which they need support from other people. Successful advocates, who are honest and open about their personal experiences, may find some discomfort when they come up against professional boundaries in supervision. An example from Poland, of an activist and a healer further illustrates the ways in which advocacy can create a stressors and how the principles of trauma informed supervision can be used to support advocates for change.

AN ACTIVIST AND A HEALER

Elżbieta Podleśna (2020) wrote about her experiences of psychological abuse in an article concerning her work in the Center for Theatre Practices "Gardzienice" in Poland. This is a very explicit and heartbreaking description of emotional exploitation that she experienced at a young age for a period of five years. She also described a process of breaking a cycle of abuse and learning how to heal her trauma. She became a well-known public figure through her activism for human rights. Recently, her advocacy work has been directed against the oppressive politics of the Catholic Church and Polish government toward women and LGBTQ communities in Poland (Holland 2021). Her most recent engagement was in helping refugees on the Polish-Belarussian border, the easternmost border of the European Union (Redakcja 2021). Professionally, she is an addiction and mental health therapist who uses a trauma-informed approach to her work. As an activist, she uses social media to bring public awareness of abuses by the police and right-wing politicians against marginalized groups of citizens.

With her activism, Podleśna exemplifies the power of the six principles of Trauma Informed Care. Since her presence in social media is open to everybody, her adherence to the guidance of TIC is clear. As a therapist she shares with others how she prepares herself and her office for a client's visit. She is concerned about the safety of people who join her in her public activities and talks with them about the possible outcomes of their advocacy actions. On her social media platform she publishes helpline phone numbers, available political supporters, and legal advocates. She informs everybody about her motives and plans of action. She transparently presents her opinions and

her worries and discusses her boundaries. She works collaboratively with other activists, appreciating the help and support of others. She is able to ask for and offer help. She acknowledges and validates other people's efforts in working toward common goals. Podleśna uses social media, radio, press, and television, street demonstrations, and any possible form of communication to verbalize her social and political messages. It seems like there is no power that could limit her freedom of speech. She uses international resources if local resources seem insufficient. Podleśna calls herself a feminist but she also has an awareness that this term means different things for different people. She calls herself leftist, although she criticizes left party leaders for their questionable motives. She criticizes authorities of the Catholic Church, but she has empathy for Catholics; she defends members of all marginalized groups, including the LGBTQ community.

What is especially interesting about the choices of Elżbieta Podleśna is that since she is fully aware that a significant amount of the power of Polish political leaders comes from secrets and lies, she is truthful and transparent in all of her actions. She shares in social media not only her political engagement but also small things that she does as a private person to heal from the abuse she receives from her enemies. And, judging from the last two elections, she still has more political opponents than supporters.

CONCLUSION

Those who choose a career in social work are dedicated to building a better, more equitable society. However, the road to social change is increasingly confrontational and fraught with consequences in the workforce, among family members, and in the general society. Supervisory practices have long supported advocacy efforts but have not been as explicit in listing the possible costs and consequences of taking an advocacy position – especially if this position is about a controversial societal issue. For example, in the United States, individuals who have provided leadership and advocacy for COVID-19 precautions have been threatened and harassed. While advocates, especially political protestors, often faced police action and detainment, few had their families threatened or their homes surrounded by angry mobs as did the head of the public health department in Ohio (Spector 2020). Supervisors, who are invested in social change and advocacy strategies, will do well to use the principles of trauma informed care and trauma informed supervisory practices to work with younger professionals who are eager to be a part of social change strategies. Trauma informed care practices are no longer only for therapeutic practice with clients. They should be introduced as part of supervisory education for those who will train and guide newly emerging professionals who have the enthusiasm, energy, and courage to push for social change.

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GENDERIZING CONSEQUENCES OF FAMILY POLICIES IN POLAND IN 2010S: A SOCIOLOGICAL PERSPECTIVE

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ABSTRACT: The aim of this paper is to analyze four reforms introduced in the Polish family system in the 2010s. The reforms were introduced as an answer to a problem of very low fertility rates, as well as instruments helping women in achieving their work-life balance. The reforms are analyzed here in terms of their (de)genderization effects on Polish mothers and fathers. The use of a genderization-degenderization axis shows that the gendered division of domestic and care work is not challenged by the reforms, but it is rather reinforced by them. It is also doubtful if the reforms will manage to reverse current demographic trends.
KEYWORDS: Family policy, genderization, gender inequalities, Poland, parental leaves, childcare

INTRODUCTION

Since the collapse of communism East-Central Europe has been facing decreasing fertility rates and is now experiencing a serious demographic crisis. The burning question is how to design a family policy system to provide people with good conditions for having more than one child. This is also the question that policymakers in Poland have been trying to answer since the 2000s. The fertility rates in Poland are at an extremely low level, 1.22 in 2003, 1.40 in 2009, and since 2013 they remain at the

level around 1.3. Poles are not deciding to have more than one child, even though in surveys they declare that they would like to (see: Mynarska 2011). The literature on family studies indicates different reasons for low fertility rates in European societies. One reason concerns gender equality. Studies show that in countries with greater gender equality where men have greater involvement in care work, people are more eager to continue childbearing (Andersson, Duvander, and Hank 2004; Duvander and Andersson 2006). At the same time, Polish researchers point out the so-called *women's reproductive strike*, which should be understood as women's decision not to have children, even against their own willingness to have them (Graff 2014; Korolczuk and Hryciuk 2012). This reproductive strike results from the burden of combining motherhood and care work with paid work and a general withdrawal of Polish men from the domestic sphere. Polish women are overloaded with unpaid work in the household and paid work in the labor market (Suwada 2021). Yet policymakers do not recognize this as a problem.

The aim of this paper is to analyze the reforms introduced in Polish family systems since 2010 through the lenses of the genderization concept proposed by Steven Saxonberg and by incorporating the perspective of Polish parents.[1] Since 1989 Polish family policy has been characterized by the lack of a coherent and long-term strategy. Up until the 2010s there was a lack of reflection on work-life balance issues and gender inequalities, even though some elements of gender mainstreaming policy started to be implemented in connection with membership of the EU (Scambor et al. 2014). Only at the beginning of the 2010s did Polish policymakers begin to slowly recognize the problem of low fertility rates and to reform the family policy system that had been practically untouched since the 1970s. I concentrate here on four reforms which have been introduced since 2010, which substantially changed the family policy system in Poland.

The article begins with a discussion of the links between family policy instruments and gender roles. I refer here to the new welfare typology proposed by Saxonberg (2013, 2014) based on the genderization-degenderization axis. Then I proceed to a description of the reforms in terms of their aims and objectives, as well as the effects they have on gender equality and gender roles, especially within the family sphere. I depict the reforms separately, since they were not introduced as a part of one coherent program, but rather were unrelated. The article concludes with a discussion of the overall effect of the analyzed reforms and its impact on gender inequalities.

(DE)GENDERIZING CONSEQUENCES OF FAMILY POLICY

Different family policy instruments differently affect fertility rates, organization of families' everyday life, as well as the gender division of domestic and care work. Various classifications of welfare states try to cluster them into different types of regimes.

[1] Because of the lack of place in the article I concentrate on the institutional settings, therefore I do not discuss a wider socio-cultural context, as well as socio-economic inequalities, that can also explain differences between the engagement of men and women in parenthood in Polish society. These issues are discussed in other publications on parenthood in Poland, see: Suwada 2017 and 2021.

Two the most common contemporary classifications analyze family policies in terms of it (de)familialization and (de)genderization effects (Kurowska 2018). Since my aim here is to analyze the effect of family policy reforms on gender roles, I refer here mainly to the (de)genderization approach, even though Kurowska claims they should not be treated as competing theoretical perspectives, but rather as complementary ones. This approach was proposed by Steven Saxonberg (2013, 2014), whose aim was to create a typology of welfare state policies that include the gender dimension of social reality. Family policies are analyzed in terms of their impact on gender roles that are understood here as particular expectations towards men and women that tell how they should act in different social situations (see Ridgeway & Correll 2004). As Saxonberg emphasizes, today the desire to eliminate gender roles has become an official EU policy, which focuses more on the equal sharing of paid and unpaid work rather than on equal treatment (Saxonberg 2013: 32). In this context we can distinguish *genderizing* and *degenderizing* policies. Genderizing policies promote different gender roles for men and women, whereas degenderizing policies fight against gender roles and bolster their elimination. There are two types of genderizing policies. The first type *explicitly* supports different gender roles by, for example, encouraging only women to leave the labor market in connection to parenthood. Whereas the second type *implicitly* upholds existing gender inequalities because of their patriarchal starting point.

In Saxonberg typology the focus is put on actual policies and their effects on individuals, rather than overall regime types within which different policies are implemented. Such an approach allows for a detailed analysis of various policies existing within one system and a clear focus on the problem of gender inequalities, which is often regarded as crucial in the context of fertility rates and reproductive decisions of Europeans. Saxonberg focuses on the two most important policies of the family system that influence gender roles: the paid parental leave system and state support for childcare. The parental leave system is degenderizing when parental leave is long enough to share between a mother and a father, the replacement rate is high enough to allow men to use the parental leave system without major financial loss to the whole family, the benefit ceiling is not too low, and there exists a quota for fathers. In an explicitly genderizing system leave is mostly a woman's right. Women have a right to highly paid leave for at least fifteen weeks. For fathers, if at all, there is only a short paternity leave that can be used to help a mother after childbirth. Additionally, both parents have a right to a long extended parental leave with a low flat-rate benefit, which usually discourages men from taking the leave. In an implicitly genderizing system there is usually no paid leave or only a short maternity leave.

Degenderizing childcare institutions are characterized by either the provision of a large number of places for all children in public institutions, or highly subsidized places in private institutions. An explicitly genderizing system provides some support for childcare, but mostly for children over three, and most likely only part-time. In an implicitly genderizing system, childcare institutions are private and operate on the free market, there are low public subsidies and a relatively small number of places for children under three.

The following analysis also takes account of child benefit instruments. Saxonberg

does not interpret child benefits in terms of their (de)genderizing effect, yet he claims that such interpretations are possible. Since child benefit policies significantly vary across welfare states, it is difficult to assess their general (de)genderizing effects. They also have various aims - universal benefits are usually regarded either as financial support for a family or as an incentive for people to have more children. Means-tested benefits are rather seen as an instrument preventing poverty among children. It can be cautiously assumed that high universal benefit might have genderizing consequences, since it might encourage women to stay home and take care of children. Whereas low universal benefits do not have such an effect, although it is impossible to classify them as degenderizing as well. In the case of means-tested benefits the genderizing consequences can only be observed among women with lower incomes. Yet to fully assess the impact of cash benefits for women, the broader social context should be taken into consideration – such as access to childcare institutions, cultural norms about care, the gender wage gap, and the situation of men and women in the labor market.

As Saxonberg underlines, there should be a clear dividing line between policies and their actual outcomes. Thus in my analysis, firstly I depict the policies and their goals, and then proceed to the outcomes. As will become clear, the aims and outcomes of analyzed policies are not always congruent. In fact, in many cases the actual outcomes are divergent from those which were anticipated.

METHODS

The presented analysis is based on data from multiple sources. First, analysis of government documents containing justifications for the reforms which they had introduced. Justifications for the reforms are published on the website of the responsible ministries together with corresponding acts. The analysis focused on four documents: the justifications introducing paternity leave from 2008, parental leave from 2013, the justifications for the "Toddler" program from 2011 and the "Family 500+" program from 2016. Additionally the speech of the Ministry of Family, Labor and Social Policy Elżbieta Rachwalska during the first reading of the government's draft law on the "Family 500+" Program from February 9, 2016 was . In the qualitative analysis conducted in MaxQDA the main goals and objectives set by policymakers were identified. These goals and objectives are strongly linked with a preferable organization of family life, in this case based on traditional gender roles. The documents were collected from the official websites of the Ministry of Labor and Social Policy (since 2015 the Ministry of Family, Labor and Social Policy) and of the Polish Parliament.

Secondly, I refer to the national statistics gathered by the Statistics Poland and the Social Insurance Institution. The statistics about the use of parental leaves and the enrolment of children to care institutions show how much the introduced reforms changed the situation of Polish parents. Finally, the analysis is based on data from qualitative interviews conducted with Polish parents in two research projects. The first project was conducted 2012-2013 and concentrated on the fatherhood experiences of Polish men. The second project was conducted in the summer of 2017 and interviews focused on the problem of the work-life balance. In both cases the issue of

family policy instruments was often mentioned and discussed by interviewees. Their experiences and reflections shed light on how the introduced reforms affect the everyday life of Polish families.

In the first project forty-six interviews were conducted with middle class parents living in large Polish cities. The interviews concentrated on the fatherhood experiences of heterosexual and coupled fathers who lived with their children. In the second project there were fifty-three interviews carried out with parents who had different social and economic backgrounds (lower class, middle class, and upper middle class), parents in different family situations (coupled parents, single parents, divorced parents, and reconstituted families), and parents living in different locations (countryside, small, medium, and large cities). The interviews concentrated on the dynamics of work-life experiences, and also on the strategies adopted by men and women in connection to parenthood. All interviews from both projects were transcribed in confidentiality and analyzed in qualitative research software (MaxQDA). The interviews from the first project were analyzed a second time in 2017 in terms of family policy instruments. The analysis was conducted using a mixed strategy of open and thematic coding (Ayres 2008; Benaquisto 2008). Captions after the citations show the gender of the interviewee, age of child/children, and the year in which the interview was conducted.

Analyzing the family policy system using a triangulation strategy, i.e. using data from different sources (Rothbauer 2008), provides an opportunity to draw relevant conclusions, in which not only policymakers' aims are articulated, but also the actual effects of the introduced reforms on the everyday experiences of Polish parents. Although it must be noted that since the analysis is mostly based on qualitative research, the results can indicate some deficiencies of the Polish family system, rather than draw conclusions on general and strong correlations. Therefore the analysis provided below should be treated as an invitation to further studies.

BACKGROUND – POLISH FAMILY POLICY SYSTEM

After the fall of communism most post-communist European states identified with the process of re-familialization and returned to more conservative family policies (Saxonberg 2014; Saxonberg & Sirovátka 2006). Yet it seems that "Poland introduced a more liberal, implicitly genderizing variant than other countries" (Saxonberg 2014: 5), in which family policy was largely ignored in the 1990s and 2000s. The Polish parental leave system had been practically unchanged since 1974 and only in the 2000s were more significant amendments introduced (Saxonberg & Szelewa 2007; Szelewa 2017). The system of public day care dramatically worsened in the 1990s because of the radical reduction of state aid to nurseries and kindergartens, as well as a neoliberal turn which transferred daycare institutions for children to the free market (Saxonberg 2014; Saxonberg & Sirovátka 2006; Szelewa & Polakowski 2008). One of the consequences of neglecting the family policy system was the dramatic drop in fertility rates in Poland and the problem of a rapidly ageing society. Dorota Szelewa (2017) describes the time after the collapse of communism as a period of implicit familialism

in the Polish family policy. The process of privatization of care and the retrenchment of the family policy budget was accompanied by strengthening conservative attitudes to gender roles. Szelewa (2017) claims that since 2005 we can observe a turn towards explicit familialism, in which the family has become important on the political agenda. Yet the greatest focus on the family was not connected with a greater recognition of a problem of gender inequalities.

This article takes into consideration reforms introduced after 2010 in the context of their genderizing effects. Did they change the path of implicit genderization taken after 1989? During this period two political parties were in power. From 2007 to 2015 the government was composed of the liberal conservative Civic Platform (PO) and the agrarian Polish People's Party (PSL). The coalition was in power through two terms. In 2015 the national conservative Law and Justice Party (PiS) won the election and formed the new government. The PO/PSL government introduced three important reforms that substantially changed the family policy system; (1) the introduction of a two-week-long paternity leave and the extension of fathers' rights to take advantage of transferred maternity leave, (2) the introduction of a twenty-six week parental leave, and (3) the launch of the program "Toddler" for institutional care for children under three. Whereas, the succeeding PiS government introduced the program "Family 500+" – a child benefit (500 PLN per month). Undoubtedly, all of these new policies substantially changed the situation of Polish families, even though the policymakers' aims were not always realized.

EXTENSION OF FATHERS' RIGHTS TO FAMILY-RELATED LEAVES

In 2010 Polish men gained the right to two types of fully paid parental leave. In one piece of legislation a two-week paternity leave and additional transferred maternity leave (six weeks) were introduced. Beforehand paternity leave was one week long, in 2012 it was extended to two weeks, and it could only be used during the first year of a child's life (and from 2015 during the first two years). Additional maternity leave was also introduced in several steps – in 2010 and 2011 it was two weeks, in 2012 and 2013 four weeks and from 2014 it increased to six weeks. Before the reform, there was an obligatory fully paid twenty-week maternity leave. Having used fourteen weeks of leave, a mother could resign from the following six weeks only if a father used them. After maternity leave both parents had the right to a three-year child-rearing leave, which was means tested and restricted to those whose earnings were below the subsistence minimum. Thus the introduction of the additional maternity leave was a substantial help for both mothers and fathers, who could not afford to take unpaid child-rearing leave. The additional maternity leave was also described as a right of the father. The new legislation also sustained a rule introduced in 2001 according to which a father can use a part of the maternity leave (Florek 2015). Thus if a mother uses fourteen of her twenty weeks of maternity leave, then the remaining six weeks can be used by the father. When the six additional weeks of transferred maternity leave are taken into account, fathers gained rights to a total of twelve weeks transferred maternity leave.

In the justification for the reform[2] the introduction of paternity leave and men's right to additional transferred maternity leave are not mentioned at all (Serafin 2010). The aim of the additional maternity leave was to help women to combine paid work with motherhood. It is unclear why policymakers decided to introduce paternity leave and to give men the right to the transferred maternity leave – they do not mention these rights in the justification. One assumption is that they wanted to adjust the law to the EU directive of equal treatment of men and women, yet this directive did not impose an obligation of introducing paternity leave (Serafin 2010). The ambivalent attitudes of policymakers to paternity leave are also reflected in the statistics and by the lack of any dissemination strategy. There was no campaign organized to inform parents of the new possibilities. Until 2013 less than 10% of eligible fathers decided to take the paternity leave. Only in 2014 did the statistics increase to over 30% (see Table 1).[3] It suggests that most parents did not see the merit in this leave. In the case of the right to a part of transferred maternity leave the lack of awareness was even greater. Some interviewees I talked to in 2013 reported that officials working in the Social Insurance Institution did not know that men had a right to transferred maternity leave. One of the interviewees had to prove to the institution that taking such leave was compliant with the law.

	fathers taking paternity leave	**number of children born**	**%**
	in thousands	*in thousands*	
2010	17,2	413,3	4,2
2012	28,6	386,2	7,4
2014	129,4	375,2	34,5
2016	146,4	382,3	38,3
2018	196,6	388,2	51,0

Table 1. Polish fathers taking paternity leave
Source: Social Insurance Institution in Poland. Prepared by the author

Even though fathers are included in the introduced legislation, it is explicitly genderizing, since the role of a father is mainly perceived in terms of a helper or an additional caregiver, whose obligation is to support an overwhelmed mother or replace her when she cannot fulfill her role. The right of fathers to use paternity leave or transferred maternity leave is only optional, whereas women are obliged to take twenty weeks of maternity leave (or at least fourteen if the father takes the other six weeks).

[2] Justification. A legislative draft act amending the act - Labor Code and some other acts. Print No. 885 available at: http://orka.sejm.gov.pl/Druki6ka.nsf/0/605642C676BBAC75C12574B8004D197C/$-file/885-ustawa.doc [accessed June 20, 2018]

[3] It is not clear what the reasons for the increase are – it might be assumed in 2013 people became more aware of the existence of this leave, since the parental leave system was then more profoundly reformed by the introduction of gender-neutral parental leave (described below).

The lack of reflection on gender roles and gender inequalities is visible in the justification of the reform, in which the problem of combining parenting with paid work is described as only a woman's issue. On the one hand, policymakers recognize the gender of individuals, but at the same time they just reproduce gender stereotypes and traditional parental roles. Men do not fit as the main recipients of family policy mechanisms.

THE INTRODUCTION OF PARENTAL LEAVE[4]

Parental leave as a right for mothers and fathers was introduced in 2013. Firstly, it was twenty-six-weeks and could be taken directly after having used twenty-six weeks of obligatory and additional maternity leave. In 2016 to simplify the system the additional maternity leave was merged with the paternity leave. Since then parents have a right to twenty weeks of obligatory maternity leave and thirty-two weeks of parental leave that is optional and can be freely shared (see Table 2). The new leave is highly paid – if parents decide to take fifty-two weeks of leave at the beginning, then the parent on leave receives benefits to the value of 80% of their salary. Whereas in the case of parents who choose to take twenty-six weeks of leave, they receive benefits to the value of 100%. If parents decide later to take an additional twenty-six weeks, the benefit is 60%.

Parental leave system till December 2012	**Parental leave system since January 2013**	**Parental leave system since January 2016**
Maternity leave (obligatory for mothers, 6 weeks can be shared with a father)		
20 weeks (14 weeks only for mothers) – benefit: 100% of salary	20 weeks (14 weeks only for mothers) – benefit: 100% or 80% of salary	20 weeks (14 weeks only for mothers) – benefit: 100% of salary
Additional maternity leave (can be shared with a father)		
6 weeks – benefit: 100% of salary	6 weeks – benefit: 100% or 80% of salary	-
Paternity leave (only for fathers)		
2 weeks - benefit: 100% of salary	2 weeks - benefit: 100% of salary	2 weeks - benefit: 100% of salary
Parental leave (can be shared by both parents)		
-	26 weeks - benefit: 100% or 80% of salary	32 weeks - benefit: 100% or 80% of salary
Extended parental leave		
36 months – means-tested benefit on low level	36 months – means-tested benefit on low level	36 months – means-tested benefit on low level

Table 2. Changes in the parental leave system

[4] The detailed description of the parental leave system in Poland can be found at the website of the International Network on Leave Policies and Research (https://www.leavenetwork.org/news/), where updated annual reports are published every year.

In the justification for the reform[5] the instrument is seen in terms of giving parents the opportunity to take care of a child during its first year of life and as a remedy for the problem of women leaving the workplace to take care of children. The latter argument is important in terms of gender inequality. The Polish system is characterized by a lack of congruency of leave and public childcare (Javornik & Kurowska 2017). It means that after having used the paid leave, there is no guarantee that a place can be found for a child in a childcare institution. This gap between paid leave and childcare services is called here *a childcare gap* in a family system. The childcare gap is a huge problem for Polish parents – my interviewees emphasized that they had to find their own strategies to deal with childcare. The most common strategies for my interviewees were: women taking a few weeks of unpaid child-rearing leave, engaging grandmothers, hiring nannies (usually without a contract) or taking shifts at work. The introduced reform, together with the "Toddler" program described in detail below, to some extent is an answer to the problem of the care gap, yet it does not fully resolve it. The prolongation of paid leave only reduced the care gap, but did not eliminate it.

The new leave is described as more of a family right than an individual entitlement. Even though in their justification policy makers indicate that the new instrument would allow parents to share leave, there is no mention about gender roles and gender inequalities within the domestic sphere. Gender inequalities are only noticed in terms of women's participation in the labor market. There is no mention of men's engagement in domestic and care work. Consequently, the reform was introduced without any incentives for fathers. What is more, from the beginning parental leave was perceived as an extension of maternity leave and mostly as a new instrument addressed to women. Such attitudes were reflected, on the one hand, in the everyday language of many interviewees, in which parental leave was often called maternity leave, but also in the language of the law, which called the benefit received by a parent on parental leave a maternity benefit (in Polish: *zasiłek macierzyński*) (Kurowska 2013). Ironically, Polish politicians liked to compare the new parental leave scheme to the Swedish system, which is regarded in Poland as a very generous one which leads to high fertility rates. The issue of gender equality was completely ignored in this context together with the instrument of a father's quota which had been implemented in the Swedish system.

The official statistics show that there is a small number of men taking the leave (both in 2017 and 2018 only 1% of all recipients are men - data from the Social Insurance Institution). The interviews conducted in 2017 also indicate that parents are not always aware that fathers have a right to parental leave. Some mothers openly said in the interviews that they were not eager to share *their* leave with their partners. Yet it does not mean that Polish society was not ready for a father's quota. There was also a huge group of parents who believed that such an instrument is needed and useful.

[5] Justification. Government bill amending the act - Labor Code and some other acts. Print No. 1310 available at: http://orka.sejm.gov.pl/Druki7ka.nsf/0/996E9241AE87223BC1257B5C0073225B/%24File/1310-uzas.docx [accessed June 20, 2018].

A: Ok, let's talk about parental leave.

B: Parental? Is there anything like that?

A:. Yes, there are six months of maternity leave and then six months of parental leave.

B: Oh, my wife stayed at home for a year. I thought it was maternity leave. (a partnered father with a 2½ year old child, 2017)

C: (…) [In 2013] I used only six months of the maternity leave because I was very focused on work and I did not want this experience of motherhood and I thought that my work is the most important thing in the world. But now, if I got pregnant now, if everything went well, I would definitely like to make the most of this time and I certainly would not start work early.

D: Ok, do you think you would like to share this leave with your husband?

C: I think *I would regret giving it to him* [my emphasis]. Because I mostly deal with housework, so I can make better use of this time, although if he said that he wanted to go on leave, I would definitely let him do it. (a partnered mother with a five year old child, 2017)

There is no reason why one of the genders should have a privileged position of having a right to parental leave. I think both parents should have an opportunity to go on leave. (a partnered father with a two year old, 2012)

The new instrument of parental leave is explicitly genderizing. Even though the instrument is described as an entitlement for mothers and fathers, it is used predominantly by women. What is more, since parental leave is perceived as an extension of maternity leave, the entitlement is seen as a woman's right that in some exceptional circumstances can be shared with the father. Consequently, the current parental leave system in Poland offers time and money mainly to women to look after their children. Even though men have started to be included in the system as recipients of leave, their marginal role in the domestic sphere is reinforced by the cultural norms about care. The potential of the reforms to change gender roles in the domestic sphere was not achieved, this is because of the decision not to introduce more interventionist instruments such as a father's quota.

THE "TODDLER" PROGRAM – CHILDCARE INSTITUTIONS FOR CHILDREN UNDER THREE

In 2011 the Ministry of Labor and Social Policy launched the "Toddler" program, which is a long-term program to increase the number of places in childcare institutions for children under three, and introduced such institutions as: nurseries, "children's clubs",

"daily caregivers" and "nannies". The reform is aimed at resolving the problem of a childcare gap in Poland. The program is still running and its yearly budget is increasing - when it was launched in 2011 the budget was 40 million PLN, in 2013 it increased to 100 million PLN, in 2015 to 151 million PLN, and in 2018 the planned budget is 450 million PLN. It was also introduced in connection to the EU requirement set in the Barcelona Strategy related to services for children – 33% of children under three should have guaranteed places in childcare institutions by 2010 (European Commission 2002, 2013). The program has also led to legislative changes that simplified very demanding requirements to run a nursery (prior to the reform, nurseries were treated as healthcare institutions, see: Saxonberg 2014).

In the justification for the reform[6] policymakers underlined the increasing problem of the work-life balance faced by women today. The articulated aims were as follows: (1) to promote women's activity in the labor market and consequently improve the financial situation of Polish families and gender equality; (2) to support Polish families with procreation plans and with raising children; (3) to guarantee access to education for all children. As is the case with previously analyzed reforms, there was no mention of the role of men in the private sphere. Even though the problem of gender inequality was recognized in the justification, Saxonberg (2014) suggests that the motivation for doing so was compliance with EU gender mainstreaming policy. Saxonberg's analysis of the role played by the EU in terms of gender equality policies in Central European countries, demonstrates that many anti-discrimination laws in Central Europe were introduced only because they were an EU requirement. What is more, in the analyzed justification gender inequality was only acknowledged in the labor market. Once again there was no mention of gender inequalities within the domestic sphere.

The reform has resulted in a slight improvement in access to daycare institutions for children under three – from 2008-2017 the number of children attending daycare increased from 2.6-8.6% (see Table 3). Although the situation is still unsatisfactory – Poland is still characterized by one of the lowest enrollment rates in comparison with other EU countries. There is a genuine need for this program, as was confirmed in the interviews, yet it is being implemented too slowly. Large geographical disparities still exist between cities and rural areas – according to the Statistics Poland in 2017 children under three who attended a daycare institution amounted to 13.3% in cities but only 2% in rural areas.

	2008	**2010**	**2012**	**2015**	**2017**	**2019**
0-3 years	2,6	2,6	3,8	6,8	8,6	12,4
3-5 years	52,7	62,6	69,7	84,2	84,7	88,5

Table 3. Percentage of children enrolled in day care institutions

Source: Statistics Poland. Prepared by the author.

[6] Foundations for the act on care forms for children under 3 years old available at: https://www.mpips.gov.pl/gfx/mpips/.../zalozenia%20zlobki%2015.07.2010.doc [accessed June 20, 2018].

One of the outcomes of the reform is the process of marketization, since both public and private childcare institutions can receive funding. Consequently, the private institutions account for 63% of all institutions. It is not clear what will happen to them when the program stops – there is a possibility that the cost of childcare will raise.

It could be argued that the program promotes degenderization since the state overtakes a part of the care obligations of women. Yet taking into account its limited effect, it is clear that the "Toddler" program did not substantially change the policy orientation. Even so, in the context of gender inequalities, this reform should be seen as an improvement for the situation of women in the labor market, but in the context of the family sphere the situation looks different. The aim of the program is to support families, yet the program in fact supports women in their caring obligations and as such does not change the gender order. Together with the parental leave scheme oriented on mothers, the system does not reconstruct the role of the father. Men are still seen in terms of breadwinners and additional caregivers, who need to support mothers, but who are not primarily obliged to provide care work (see: Pustułka, Struzik & Ślusarczyk 2015; Suwada 2021). Comparing the percentage of children enrolled in childcare institutions, it is clear that there is still a huge gap between children under and over three. It means that women are still expected to resign from or limit their paid work for the sake of motherhood for the first three years. The gender-neutral language of the reform results in explicit genderization.

The interviews also support the assumption that childcare institutions are perceived as an instrument to help women in combining work with motherhood. Parents often emphasize that there is a need for greater support from the state in terms of childcare institutions. The main reason for such a need is help for women expressed by mothers and fathers. Men never mention the potential benefits for them from such support, probably because they are never expected to leave the labor market because of the lack of places in nurseries.

> I believe the state should provide access to daycare institutions for all children. You know, making these institutions near to a workplace… Maybe companies should build nurseries and kindergartens? To have somewhere near to a workplace. I think it should be the standard. It would be very helpful for mothers (a partnered mother with a seven year old child, 2017)

> Why can't I have access to a nursery … get a place in a nursery? This is a part of the family policy, isn't it? At this moment the best option would be … if my wife gave up her work [my emphasis] and took care of our child. It is profoundly sad that there are not enough places in nurseries. (a partnered father with a four month old baby, 2013)

THE "FAMILY 500+" PROGRAM

The "Family 500+" program is the flagship program of the governing Law and Justice party, which they introduced in April 2016. It offers a monthly cash benefit (500 PLN, approx. 110 EUR in November 2021) for every second and subsequent child regardless

of the family's financial situation. Initially for families with only one child the benefit was means tested, since July 2019 it has beed granted to every child in the family until they are 18 years old. The scope and budget of the program is an exception in the Polish welfare state. In 2017 and 2018 the annual cost of the program was around 22 billion PLN (it is almost fifty times more than the budget for the "Toddler" program in 2018). In 2019 it raised to 30,5 billion PLN. In 2017 2.5 million families were entitled to receive the benefit (3,7 million of children). In 2019 the number of children raised to 6 million children[7]. The current government describes the program as a systemic and critical instrument of family policy that is a solution to the demographic crisis. This crisis results, according to the government, from the bad economic situation of young people, who decide not to have more than one child and to emigrate. So the aim of the program is not only to encourage Poles to have more children, but also to encourage them to stay in Poland, or even return from abroad. The second aim of the program is to combat child poverty.[8,9]

The program gave rise to multiple controversies from different political sides. A monthly tax-free 500 PLN subvention is a considerable amount of money, keeping in mind the fact that the median monthly income in Poland in October 2016 was around 3,500 PLN before taxes (approx. 2,500 PLN after taxes) and the most common income was around 2,100 PLN before taxes (approx.1,500 PLN after taxes) (Statistics Poland 2018). Analysis of the interviews from 2017 indicates that part of the Polish middle class parents tend to assess the program negatively based on stereotypes of poor parents with big families who spend money on alcohol and things not devoted for children. Other middle class parents perceive it as a necessary redistribution mechanism, which hopefully reduces income inequalities. For lower class families the benefit is regarded as much needed help. None of the interviewees thought that it could actually encourage people to have more children. The same concerns are expressed by experts who underlines that so far the program has no significant effect on fertility rates (Karwacki & Szlendak 2021; Magda et al. 2019).

In the context of gender inequalities when the program was introduced, some critics are afraid that it will encourage women to leave the labor market for motherhood (Karwacki & Szlendak 2021). And in fact such effect was observed by the experts, who estimated that during the first year from the introduction of the program around 91-103 thousands women with one or two children withdrew from the labor market. This mostly applies to women with lower level of educations and living in smaller cities (Magda et al. 2019). Since women in Poland earn less than men (Statistics Poland

[7] Data from Statistics Poland, available at: https://bdl.stat.gov.pl/BDL/start [accessed January 20, 2021].

[8] Justification. Government bill on state aid in raising children available at: http://orka.sejm.gov.pl/Druki8ka.nsf/0/6A2B97FB4F15F393C1257F4D002A61A2/%24File/216-uzasadnienie.doc [accessed June 20, 2018].

[9] Speech by Elżbieta Rafalska, Minister of Family, Labor and Social Policy at the first reading of the government draft law on state aid in raising children on 9 February 2016 available at: https://www.mpips.gov.pl/wsparcie-dla-rodzin-z-dziecmi/rodzina-500-plus/dokumenty-i-opracowania/wystapienie-elzbiety-rafalskiej-minister-rodziny-pracy-i-polityki-spolecznej-podczas-pierwszego-czytania-rzadowego-projektu-ustawy-o-pomocy-panstwa-w-wychowywaniu-dzieci-/ [accessed June 20, 2018]

2018), the program can be described as gender-blind, because it does not recognize the potential effects on labor market participation of men and women. As such the mechanism has a genderizing effect especially on lower class families. This assumption was also confirmed in the interviews with lower class parents, in which it was often emphasized that the benefit 500+ when combined with other benefits, equaled the minimum wage. If this wage is earned by physically demanding work, for example in a factory with exhausting working hours, the decision to leave the labor market at least for a few years is easy. Additionally, in the countryside and small towns, there is often a greater problem with access to a daycare institution, which is an additional factor pushing women out of the labor market.

> And there is this 500+ now and I have more money than when I worked. Additionally, if I go back to work, I will have to wake up at 4 am because I have a bus at 5.20 am. We have three shifts at work, but I would not work at night because of the children, right? And this is hard to deal with. I have a friend who has a child of the same age, but she has a grandmother to help, so she can go to work, but me? No, it is impossible… It is difficult. (a partnered mother with two children, aged two and five, 2017)

GENDERIZING CONSEQUENCES OF THE REFORMS

The discussed reforms significantly improved the situation for the parents of young children. This is especially so concerning the changes in the parental leave scheme prolonging highly paid parental leave from twenty to fifty-two weeks, and also for the "Toddler" program, both of which had an impact on the everyday life of parents (particularly in big cities). In 2012 and 2013 interviews were conducted with parents who had no opportunity to profit from the new instruments – all of the women who were interviewed had the right to a twenty or twenty-six week maternity leave, and some of the men had the right to one or two weeks of paternity leave. Many of them had unsuccessfully been looking for a place in a nursery for their children aged under three, but were forced to engage grandparents (mostly grandmothers), hire nannies, or find different ways to organize care for their children. In interviews carried out in 2017 there was more satisfaction from the parental leave scheme, especially from parents who had their first child before 2013, and their second or subsequent child after the introduction of parental leave. What is more, in comparison with interviews conducted in 2013, parents in 2017 did not think that the period of leave should be prolonged. They mostly thought that fifty-two weeks is a proper length of time for maternity and parental leave. Yet there is still a problem with finding a place in a childcare institution for children under three, though middle class parents from big cities are facing fewer difficulties in 2017 than in 2013. Also the "Family 500+" program is mostly described as a great financial help, especially by parents with lower incomes.

In terms of gender inequalities the reforms did not propose the reconstruction of gender order. In fact none of them recognized the issue of gender inequalities, because all of them treat the family policy instruments as family-based entitlements rather

than individual ones. A mother and a father have a joint right to thirty-two weeks of leave, and a joint right to 500+ benefit. According to policymakers they should choose how they want to share it. Even though men were included in the parental leave scheme and women's unfavorable situation in the labor market was recognized in the official documents, policymakers still see the family as a unit and design instruments for a whole family, not an individual parent. What is more, Polish policymakers recognize the problem of gender inequalities in a narrow perspective, in which only a woman's position in the labor market is acknowledged. Such a perspective ignores the fact that gender inequalities are of structural character and inequalities in different spheres of social reality are interconnected. Women's disadvantaged position in the labor market is related to their domestic and care obligations. Based on gender beliefs (Ridgeway & Correll 2004) men are not expected to participate in this unpaid work to the same extent. And in Poland indeed they do not - in 2013 an average partnered man with children aged 0 - 17 years spent half the time on household and family care duties (3 hrs 2 mins per day) than an average partnered woman (6 hrs 46 mins per day) (Statistics Poland 2016). Consequently, women's double burden hinders their participation in the labor market – being overwhelmed at home can make women less engaged in their paid work. By ignoring men's privileged position in the domestic sphere, policymakers are not able to design a policy system reducing gender inequalities in the public sphere.

On the one hand, it could be argued that the first step was taken in the direction of making men more involved in family life by giving them the right to transferred maternity leave in 2010, and then to parental leave in 2013. Yet it was not the intention of these reforms. In fact, it is not clear why policymakers decided to give men rights to parental leave. It might have been that the aim was to make it easier for men to use the leave in some exceptional situations, in which women could not fulfill care and domestic obligations. Even if we assume that the aim was to make fathers more engaged in the domestic sphere, their role is still seen in terms of an additional caregiver. A man's right to parental leave is not enough. It is confirmed by the experiences of the Nordic countries, which show that such a right granted a few decades ago did not make men automatically more involved in family life (Kaufman & Almqvist 2017; Lundqvist 2011). Even though Polish fathers have a right to parental leave, they do not use it. It suggests that granting men the right to parental leave without so called 'fathers quotas' basically makes their position even more privileged, since they gain the right to choose to what extent they want to be involved in taking care of their children.

The reforms did not improve women's situation in the labor market. The studies show that their position is still not equal to men's. Women still earn less, more often work part-time, have longer breaks from employment because of parenthood, are less often promoted, and their participation in the labor market is more often perceived in terms of economic necessity rather than pursuing a career (Kotowska et al. 2008; Suwada 2021). Also the introduced reforms show that the aim is not to make women's position in the labor market equal to men's, but rather to help women to achieve a work-life balance by prolonging parental leaves, encouraging men to be more engaged secondary caregivers, and assisting in care by creating more places in day care institu-

tions or giving a cash benefit. None of the analyzed reforms challenged the gendered parental roles as such. They have explicitly genderizing consequences in accordance with the assumption that women have a personal obligation for care and domestic work, and that the role of the state is to support them in it.

CONCLUSION

Low fertility rates are an urgent problem for the Polish welfare state. For the last few decades they have never exceeded the level of 1.5. Thus in the near future Poland will be dealing with the consequences of an ageing society. It is in the interest of the welfare state to prevent at least some of these consequences by reversing the current demographic trend. It is commonly assumed that one way to do so is to design a family policy system that allows parents to combine family life with participation in the labor market. This assumption is based on a premise that labor market conditions are unfriendly for parents, especially mothers. Then the aim of the family policy is to reduce the tensions between labor market requirements and family life and also to protect parents. There is still a problem of ignoring the gender dimension in such thinking. The experiences of some European countries indicate that fertility rates are connected with the level of gender inequalities in a society (Duvander & Andersson 2006; Lappegård, Rønsen, & Skrede 2011). Irena Kotowska et. al. (2008: 843) notes that policies that diminish differences between gender roles and promote gender equality strengthen the reconciliation mechanisms of the policy system by reducing the incompatibility between work and family requirements for men and women. Yet other research shows inconclusive results on links between fertility and gender equality (Billingsley & Ferrarini 2014; Neyer, Lappegård, & Vignoli 2013).

What is the situation in Polish society? Does gender inequality affect people's reproductive behavior? Following the reasoning of Neyer, Lappegård and Vignoli (2013), I understand here gender equality as a situation in which there is fairness and social justice between men and women. So the concept is not about the sameness of men and women, but equal opportunities to participate in different areas of social life. Neyer, Lappegård and Vignoli (2013) indicate that to understand the links between gender equality and fertility there is a need to distinguished between gender equality in family-oriented institutions and gender equality in individual-oriented institutions. The incongruent development of gender equality in these two areas leads to low fertility in society. This might be true of Poland. In the Polish context we can observe quite high gender equality in individual-oriented institutions such as the labor market or education. Polish society is an example of a society in which women's participation in the labor market and in education is unquestioned. Even though women are often perceived as a secondary labor force (Kotowska et al. 2008), they are better educated than men and expect to contribute to household income. On the other hand, there is low gender equality in family-oriented institutions in which women carry a double burden and spend much more time on unpaid work in the domestic sphere than men.

Before the reforms of the 2010s the system was implicitly genderizing because of its market-orientation and a general negligence of family policy. The introduction of the

reforms changed the system into an explicitly genderizing one. Most of the reforms are based on the assumption that the main obligations within the family sphere belong to women. There has been a slight change in the perception of the father's role, not only in terms of being the main breadwinner, but also in terms of an additional caregiver, yet this change is not connected with the reconstruction of the gender order. The described reforms were introduced as an answer to the problem of low fertility rates. Yet even though policymakers recognize that low fertility results to some extent from women's increasing problem of combining work with motherhood, they totally neglected the issue of gender inequalities within the domestic sphere. This shows that Polish politicians still treat the family policy system as a tool for raising fertility rates (Korsvik and Warat 2016) rather than as an interventionist mechanism reducing gender inequalities (Kurowska et al. 2016). This begs the question whether it is possible to reverse the demographic trends without a shift in thinking about gender inequalities by Polish policymakers. Current fertility rates and the experiences of other countries raise serious doubts as to whether there will be a positive outcome.

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RE-CLOSED BORDER AS AN EVERYDAY EXPERIENCE. EXPLORATORY RESEARCH OF POLISH-GERMAN TWIN CITIES IN THE FIRST MONTHS OF A COVID-19 PANDEMIC

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ABSTRACT: Borders' closure during the COVID-19 pandemic had a particular impact on the everyday life of borderland residents. As part of the research on bordering processes carried out since a few years, during the closure of the state borders in 2020, qualitative interviews on everyday life in the COVID-19 pandemic have been conducted. In this paper, we present the results of the exploratory study on the impact of the COVID-19 pandemic on Polish-German border twin cities. We indicate at what levels borders' closure affected the border landscape, border practices of the inhabitants of the researched territories, and their notion of the border. We also suggest how border relations were shaped due to differences in the management and perception of the pandemic situation in two countries. The results obtained indicate that the closure of borders has made life more difficult in an area under examination and has also affected the identity and specificity of the place. This issue is worth exploring further to establish the true extent of the impact of the pandemic in the borderlands.
KEYWORDS: COVID-19; pandemic; lockdown; border; twin cities; everyday life

INTRODUCTION

One of the unexpected consequences of the COVID-19 pandemic was the closure of state borders resulting in the temporary replacement of 'thin borders' by 'thick borders'—restricting the movement of people and goods because of re-establishing control and limiting their ability to cross (Haselsberger 2014: 506), thus reverting the process that had prevailed in Europe after the cold war. Border closures introduced new forms of border control and governmobility, and therefore—in the words of Bærenholdt—how "societies are ruled through connections" (2013: 20). Treating people and goods coming from abroad as potential coronavirus carriers has perpetuated the notion of states as distinct legislative, territorial, and cultural formations that can maintain their independence in a globalized world of flows.

As a result, the closure of borders had significantly changed political and economic relations, but also impacted everyday life. According to Berger and Luckmann (1966), it can be understood as a primary reality where individuals continuously and repetitively fulfil their most crucial needs, including those of a social nature—practices related to self-fulfilment, household maintenance, education, or work. In border areas, such everyday activities often include crossing a border and are accompanied by conversations about the border, taking account of different legal systems, exchanging currency, or being under surveillance by security services. To fully recognize the significance of those daily activities, contemporary border studies refer to them as bordering practices (Scuzzarello & Kinnavall 2013). This concept helps to see the connections between the different dimensions of bordering: phenomenological (how the individuals experience and negotiate their ideas of the lived world during those activities), political (cross-border integration), and the cultural landscape of the border region (Sohn 2014a).

Implications of changes in everyday routines (and bordering practices) are even more significant in so-called 'twin cities', where many everyday residents' needs are met on the opposite side of the border (Kaczmarek 2001). Twin cities are neighbouring cities having a joint urban layout but divided by the border, often due to historical circumstances. Twin cities are also usually peripheral in terms of their population, location, and economic position for both countries but essential for international cooperation and intercultural integration (Joenniemi 2007: 2). They try to develop their economic foundations and identity not on distinctiveness but of interdependence on their foreign counterparts (Ibid). At the economic, social, and cultural layer, interconnected development has significantly accelerated in central Europe in the last two decades. This phenomenon was mainly due to debordering processes understood as gradual facilitation of cross-border exchange by eliminating some of the material and institutional barriers (Sohn 2014a).

During the pandemic, people in all of Europe have changed their everyday practices, which led to declining quality of life, new ways of performing social roles, and impacting financial situation and plans (Eurofund 2020). However, as can be assumed, this rupture of daily routines and definitions of the situation affected in a specific way the inhabitants of border areas, where it was simultaneously associated with the

closure of borders. This is the main reason why in this paper we seek to empirically identify the main types of consequences of the COVID-19 pandemic on the border and in the everyday life of people living nearby. The principal question is: *how COVID-19 influenced bordering practices and imaginaries of borderlands among its residents*. We are focusing on the example of the Polish-German twin cities Gubin/Guben and Słubice/Frankfurt Oder with the surrounding areas. More specifically, addressing this question seems to be important for two reasons. Firstly, it allows for a better understanding of the social consequences of the pandemic in border areas (especially in twin cities), not only limited to the individual's economic situation but also including identity and sense of place. Secondly, posing such a question can provide findings on bottom-up reactions to border closures and border as an experience, considered substantial for further development of contemporary border studies (Parker & Vaughan-Williams 2009). The pandemic situation provides an opportunity in this regard. As a crisis, it fosters the reflection and discussions with inhabitants on everyday habits and bottom-up experiences.

PROCESSES OF CLOSING AND OPENING THE POLISH-GERMAN BORDER

The Polish-German border on the Oder and Lusatian Neisse was marked as a result of the changes after World War II. The first 25 years after the war was called 'the closed border period' because it was only possible to cross it based on special passes. In January 1972, the border between Poland and the then German Democratic Republic was opened for free travel for residents of both countries. On October 30, 1980, the German authorities closed the border again. The reason was the Solidarity Movement in Poland and fears of spreading the ideas of freedom on East German territory. Since then, the border could not be crossed without officially confirmed invitations. The border was reopened after the political changes in 1989. These changes, including the fall of the Berlin Wall, symbolically regarded as the end of the communist bloc, affected almost all of Europe. In November 1990, the Polish-German border treaty was signed, which sanctioned the functioning of the border in its current form. This enabled the development of cooperation between the twin cities, which introduced visa-free traffic and preparations for the foundation of the Pro Europa Viadrina Euroregion. However, the 1990s were still a period of repeated border tensions. For example, the dormitory of the Viadrina University in Frankfurt was set on fire as a protest against the increasing number of students from Poland (Asher 2012: 500). Ambiguous emotions accompanied the period immediately preceding Poland's accession to the European Union and the Schengen Area, resulting in fears of crime by Poles and stoking right-wing sentiments in Germany (Barthel 2020: 3; Jańczak 2018: 521). After 2007, when Poland joined the Schengen Area, twin cities like Frankurt-Słubice or Gubin-Guben became crucial from the perspective of the success of the Europeanisation project (Asher 2012: 501).

The transformations of the border reflected in the development of Polish and German sociological research on the borderland. Examples of research topics include identity issues (Machaj 2005), borderland social problems (Kurzępa 2007), research on twin cities (Schultz 2005), borderland during the Polish political transformation of

the 1990s (Osękowski & Szczegóła 1999). After 2007, the changing border landscape has become more closely studied due to increased mobility and the removal of formal controls (Kaczmarek 2010; Szlachcicowa 2019). Some researchers have even considered the twin cities as "laboratories of European integration". For example, Roose and Opiłowska were analysing how institutional activities (including creation of the Euroregions mentioned above) made it possible to realise the European Union's assumptions on cross-border cooperation and cultural exchange (2015).

One of the most recent research projects [*De-Re-Bord. Socio-spatial transformations in German-Polish 'interstices'. Practices of debordering and rebordering*] on this subject focuses on the socio-spatial transformations after 2007. The project adopts a processual understanding of the border. This means that changes in the functioning of the border are a constant phenomenon and that they can have two manifestations. Diminishing of the border and the facilitation of flows (debordering) on the one hand, and its sealing and strengthening (rebordering) on the other (Newman 2006: 180). Such changes are perpetuated not only on political, legal, and identity dimensions, but also on the landscape and everyday people's habits and experiences.

In the first stages of the project, several aspects of rebordering and debordering processes in Polish-German twin cities were identified. The process of debordering concerns such matters as the removal of border controls, the free movement of people across the border, the use of services by residents on the other side of the border, mutual contacts on both institutional and bottom-up levels. Shopping and consumption are critical here, but such activities include also living, working, and studying in a foreign part of twin cities and cross-border recreation. There are also institutional initiatives aimed at partnership (pupils mutual visits to schools, joint sessions of the Town Councils, police and border guard cooperation). At the same time, rebordering processes can be observed, what is especially visible at the economic level because of using different currencies in both countries. This is reinforced by cultural and linguistic differences and occasional border controls within the territory of both countries. Actual and imagined differences are reproduced, for example, through consumption. On the Polish side, one buys vegetables, cigarettes, alcohol, fuel or cheaper sweets and fizzy drinks, while on the German side of the border, one buys household chemicals or electronics. Describing these patterns, Asher points out that the type of products bought by Poles and Germans on both sides of the border reconstructs the ethnicity and hierarchy in the Frankfurt-Słubice twin city (Asher 2005: 133-136). Germany is imagined by buyers from both sides of the border as a country that produces high-quality, technologically demanding products and places higher taxes on goods that are harmful to health and the environment. At the same time, Poland appears as a country where fewer chemicals are used in the production of vegetables or cold cuts and a more deregulated place when it comes to the consumption of harmful goods.

The institutional debordering of the Polish-German border was suddenly suppressed and reversed because of the COVID-19 pandemic. Poland was one of the first EU states to close its borders on March 15, 2020. Controls, barricades, containers, and tents appeared at the border crossings with Germany. Those who wanted to enter Polish territory had to undergo a fourteen-day quarantine. This also affected Poles work-

ing on the German side, who could no longer freely cross the border. Only those Polish citizens who remained on the German side could continue their work. These restrictions were lifted on May 4, 2020. The final reopening of the border and the abolition of controls took place on June 13, 2020. Meanwhile, the COVID-19 pandemic caused an unprecedented situation on the Polish-German borderland. It was an institutional decision that led to blocking movement and flows, changes in everyday practices, ways of understanding the border, and the sense of place of ordinary inhabitants of borderlands.

METHODS

Within border studies, the social processes of everyday debordering and rebordering are becoming more important than the border described only from the perspective of formal, international relations (Jensen 2013). Border studies have emphasised the role of non-state actors—individual residents, NGOs, entrepreneurs—in creating the principles of functioning and understanding borders (Cassidy et al. 2018). This paper draws attention to the specific dimension of these actors' border practice: border talks. These are bottom-up narratives about the border, reconstructed during everyday conversations of border residents (Doevenspeck 2011). Such practices are co-produced by public discourses which frames the ways of understanding the border and their consequences for the life of borderlands' inhabitants. They also structure the experience of the residents and thus produce common local knowledge.

Reference to Doevenspeck's concept, although initially developed for the analysis of the bottom-up construction of the Congolese-Rwandan border, seems to be inspiring for two other reasons when analysing European twin cities. The dynamics of ordinary people's conversations analysed by Doevenspeck was characteristic also for the Polish-German borderland. They referred to the dangers but also the benefits drawn from the Other, and they combined bottom-up experiences and sensory perceptions with the residuals of the media discourse on political and national differences. The pandemic also fostered border talks. German-Polish border closure affected the flows through it and thus the everyday practices of the inhabitants of the twin cities. The border once again became a focal point of interest because its previous, taken-for-granted functioning was questioned. In this way, the reality of the everyday life of the inhabitants of the twin cities was also disrupted. The pandemic has thus reframed the functions of the border in everyday life, intensifying thinking and conversations about it.

Between March 24 and May 11, when the Polish-German border was still closed, we conducted thirteen individual semi-structured interviews with the inhabitants of the Polish part of Gubin-Guben and Frankfurt-Słubice twin cities and their surrounding areas. Because of the lockdown, the interviews were conducted via phone (Irvine 2011). The interviews were conducted with participants who had taken part in the earlier stages of the De-Re-Bord project. Among the respondents were inhabitants diverse in terms of: gender (seven women, six men); age (the youngest interviewee was about 20 and the oldest 70 years old); place and type of residence (seven from

the Słubice area, five from Gubin area, one from Poznań; ten from urban areas, three from rural areas); occupation (e.g. a porter, a library worker, a truck driver, as well as four experts: presidents of local merchant and community organisations, journalist, director of cultural institution).

The interview scenario addressed four main issues: recognising the changes in the functioning of the border caused by pandemic border closure, their evaluation, expectations toward their long-term consequences for cross-border cooperation, understanding the border (in the context of pandemic experiences). The more important parts of the interviews have been transcribed and coded according to the topics covered by the interview using a MAXQDA software. The empirical data was analysed using the typological method.

RESULTS

The Polish-German border's closure due to the COVID-19 pandemic was noticed in everyday life of borderland inhabitants in the four main areas. They concern different aspects of bordering practices: how border space is experienced during COVID-19 restrictions; what activities can be carried out there (work/education, household duties or self-fulfilment); reactions to border closures; and knowledge and understanding of the border's importance and roles.

'An empty bridge looks terrifying'—an unusual border experience

As a result of the reduction of border traffic, the local landscape changed, creating a surreal experience for people living close by. The reasons were both the suspension of the everyday life rules and obviousness (as a result border closure and the accompanying changes in the functioning of the individuals and local community), but also the anxiety and fear caused by the prospect of losing one's job or health because of the pandemic.

An important dimension of the local landscape became the elements associated with the state of emergency: the police cars placed along the borders and controls carried out by people in protective clothing. Many residents mentioned specific soundscape: pervasive silence in the city, the noise of wandering people, their suitcases knocking on pavements, the lack of a so far widespread German language, or announcements made from police cars. On the one hand, the residents evoked images of huge traffic jams after announcing that the borders would be closed. On the other hand, a shared experience of the emptiness appeared just a few days later, which concerned empty bridges and other, so far busy places: 'There were remarks that everything is allowed at the bazaar[1]. When something stopped functioning in the city, the orchestra was still playing [on the bazaar], like the Titanic. But necessarily, when the customers stopped coming, the bazaar stopped functioning' [ID22].

The interviews bring back memories about people returning to Poland from other countries, who landed in Berlin and tried to cross the border in Słubice: 'It was a bit

[1] The interviewee talks about Bazaar Europa, the biggest market place in Słubice.

like an airport in the city because many people were moving around the city with their suitcases. They also had trouble getting taxis, some in hotels, someone was picking them up' [ID22].

The experience of this change was intensified by confusion—uncertainty about the rules of crossing the border, changing every few days:

> These government decisions were made very quickly, and a lot was happening [...]. It was unclear what these decisions would be like, whether these borders would be closed, what now with work. Many people had to move there not to cross the border; it is already a publicised topic that families were separated, mothers or fathers sometimes had to leave their children, sometimes they both work abroad [ID24].

The experienced situation combined emotions and memory, bringing back memories from the past (Opiłowska 2014), when the border was closed during the cold war: 'We are locked in. Closed around us, as it used to be during the communist era'. [ID29]. The possibility of the free border crossing was one of the key features that inhabitants perceived of the systemic and (geo)political changes of the last 30 years.

'There are no Germans, and there is just a catastrophe'—problematic actions

Border closure had an impact on the possibility of earning money. In the first weeks, the restrictions threatened to quarantine all Poles working in the German border area. This forced either multi-day breaks in work or temporary residence on the German side: 'Some people start to run out of bread, so much has changed, because if somebody worked on the German side and cannot work overnight, problems start [...]. If somebody comes to me to chop up trees because there is no bread' [ID12]. The expanded sector of cross-border services such as hairdressers, beauticians, dentists was also deprived of income.

The specificity of twin cities is to fulfil different life needs on both sides of the border. Polish children often go to German schools. Polish residents have a registered business activity in Germany and use leisure activity infrastructure. After closing the border, access to many necessary services and goods was restricted. Likewise, institutional cross-border initiatives such as the Hanseatic League Day and the Frankfurt and Słubice city council meetings were suspended. The resident mentions that 'the twin city model, promoted for years, has failed' [ID11].

Such a collapse of the previous actions resulted in creating new activities and forms of cooperation. German employers helped their Polish employees with temporary accommodations in the German borderland and organised additional border transport. The border bridge in Słubice served as a place for handing over various things. The residents recalled how Polish veterinarians handed over medicines for German animal owners. However, the authorities banned these practices because they became abused: medication and cigarettes were exchanged. Drivers began to play the role of intermediaries in Polish-German social and shopping relations, as they could cross the border without quarantine. As we learn from the wife of one of them: 'Such requests

are common, we are already sick and tired of them. If it is important, everyone wants to help. However, if we are supposed to be, well, a middleman for people's shopping, it becomes a bit of a nuisance' [ID24].

'German restaurants are open until 6:00 pm as if you cannot get infected at 5:30 pm'—the attitude to the closure of the border

The decision to close the border resulted in various reactions. Some people strongly supported this decision:

> There was a bit of a narrative "the virus is from the West, from abroad", which fits very well into the narrative of the Polish government [...]. There were such voices that we in Poland will succeed. We need to cut ourselves off from all this evil, a leftist virus of corruption [ID22].

Others pointed out the costs of this situation for the local economy and called for less strict regulations. One of the residents pointed at the differences between Polish and German standards of coping with the pandemic:

> I am delighted they closed the border to foreigners because now I see that many people from Germany visited Słubice, and I can see what kind of behaviour and attitude they have towards this situation—they do not care at all [ID35].

The residents have differed in evaluating detailed regulations, but they were unanimous and critical of their effectiveness. Some statements point out that there was much powerlessness in the act of closing the borders. They defined the situation as an expression of a lack of actual control or even a political spectacle. Others pointed out that further necessary actions did not follow the decision to close the borders: 'The people who were obliged to be in quarantine after crossing the border were walking around Słubice, shopping [...]. They were mixing among themselves. A failure, a tragedy! The organisation was terrible' [ID35].

Different attitudes towards the closure and restriction of border traffic resulted in protests. The Mayor of Słubice, under pressure from Słubice's inhabitants, appealed to the Lubuskie Voivodship Governor to close the border entirely. Poles working on the German side of the border also protested. Some of the protests were of a more symbolic and performative character, e.g., walking on the embankment or hanging banners: 'The most effective way of protesting was a banner on the bridge in Słubice—"Open the border, we will survive together"—something like that' [ID27].

'That is why we have the European Union—so that there are no borders'—reflection on borderline

A reflection has accompanied the change of the landscape and practices on the border as a line dividing two countries and legal systems. The residents mentioned that they started to feel the border again: 'Everyone realised. Older groups remembered, and youngsters realised that something like this once existed and that the border has brought many topics throughout history' [ID11].

The border emphasised experiencing cultural differences between Poles and Germans during the pandemic, such as using remote contact and teaching technologies in schools. The initial lack of understanding of German employers for Polish restrictions and even for differences in culinary habits was indicated:

> Imagine, you have worked all year round, hired 20 people, made 20 hectares of asparagus and today there is no one to buy it - this is some kind of joke [...]. Those who have a garden market here at the border, if they cannot sell it here, will not sell it at all (to Polish customers). First, it is a bit expensive. Second, we are not taught to do certain things. The Germans eat it every day, and we do not see it on the tables like [ID12].

Some of the residents mentioned differences in the approach to the pandemic itself—more reckless in Germany and more responsible in Poland:

> When the Germans saw me walking into the hall with my gloves on and my jacket on my face, they knocked themselves on the head like I was crazy [...]. I talked to a guy three weeks ago, and now he will not look straight into my eyes. I told him: "Watch out because everyone thought they would be okay. The Italians, the Chinese... You are still well because you are a rich country and you have better health care than us. Better hospitals, more doctors, but also more people". They are idiots, believe me. A guy walks through the room and sings: "Coronavirus, coronavirus!" [ID 35].

This type of argumentation fits into the general framework of thinking about Polish-German relations. Poles like to stress that Germans can afford a 'carefree attitude' due to their higher level of development. In contrast, Poles are more 'resourceful and disciplined' because they have to. We can interpret that as another example that the pandemic and its aftermath reinforced rather than modified previous attitudes and perceptions towards German-Polish relations. The resourcefulness of Poles implied in the quotation had also been raised earlier, for example, shortly before Poland's accession to the Schengen Area, when the alleged resourcefulness and initiative of Poles was seen as an opportunity for the declining German post-industrial border cities. Polish entrepreneurship was then characterised by a younger and more mobile workforce and smaller in size and employment that were supposed to support the transformation of the declining economic monocultures of East German cities (see, i.e. Matthiesen 2005).

DISCUSSION

Several findings emerge from our research. First, the COVID-19 pandemic, the period of lockdown, and restrictions on border traffic significantly changed the lives of border residents. It has become challenging, if not impossible, to carry out everyday practices that are dependent on the border, such as shopping, recreation, work, and study on the other side of the border, providing services to the inhabitants of the other side. Not only inhabitants' situation but also place image and borderland identity (an essential part of which is the feeling of being part not so much of the periphery as of the cen-

tre of a cosmopolitan project of EU integration) have been disturbed. Emptiness and dismissal were present in the borderland and all the areas affected by the restrictions related to COVID-19. At the same time, in the statements of the borderland residents, one can see a desire to point out the specificity of their experience in this area – the atmosphere of a place without cross-border flows. This may be the way to maintain their identity as a borderland inhabitant during a closed border period.

Second, the pandemic was a time for articulating differences between Poland and Germany. On the individual level, it revealed the way of thinking about 'resourceful' Poles who can fight the virus and 'carefree' Germans who are quite loosely approaching the resulting threat. On an institutional level, it underlined the differences in the regulations for dealing with the pandemic as an epidemiological threat. The lack of parallel regulations resulted in the inhabitants' perception of the lack of control over the hitherto unknown, invisible threat. As we heard, this was also a reason for stigmatising ones who maintained too close relations with those on the other side of the border.

Third, the time of the closed border revealed its fundamental economic significance for both sides. On the one hand, Poles who worked on the German side could not freely cross the border. Only by staying in Germany could they continue to work, while those who crossed the border every day had no such possibility. This concerns many people because it is estimated that about 70,000 Poles travel to work in Germany every day (Bilger 2020). On the other hand, closing the border was a significant inconvenience for the Germans, who used cheaper purchases and services on the Polish side. After opening the border, this was even the subject of a 'survey' conducted by the 'Nordkurier' daily newspaper. The question was what the respondents were most happy about after the opening of the Polish-German border. Most people (42.1%) answered that from the possibility of buying cigarettes on the Polish side, 22% from holidays in Poland, 9.3% from the opportunity to see the family, and 7.7% from cheap petrol (Bahr 2020).

Fourth, the time of the pandemic did not significantly change residents' perceptions and expectations of the border. When asked about normality after the pandemic, Polish borderland residents advocated a return to the situation before COVID-19. If there were any changes in the border crossing regulations, it was only in future harmonising standards of dealing with similar situations. The paradoxical consequence of closing borders would be to realise that more important than controlling border traffic is a shared culture of restrictions. Such culture allows the coordination of actions at an institutional level and similar compliance patterns with restrictions on both sides of the border. This would be particularly important for twin cities, which further development as interdependent hubs depends, it now seems to us, on the development of more elaborate strategies than physically dividing them from one day to the next.

Fifth, the pandemic period has shown the existing processes of debordering and rebordering excitingly. The rebordering process was present at that time, primarily on an institutionalised level. State and local authority activities aim to tighten cross-border flows restrictions while maintaining cooperation at the symbolic level, e.g., logos or remote ritual meetings. The inhabitants' attitudes aimed to seek new, informal

ways of sustaining the flows: the transfer of goods across the border, the transport of parcels by drivers, symbolic protests against restrictions. This can be seen as seeking new forms of internalising and embodying relations and practices for sustaining international mobility which is fundamental to these places' daily functioning and identity. This situation revealed a rare process in which debordering occurred at the micro-level and its reproduction at the mezzo- and macro-level. Contemporary research shows that these processes are oppositely taking place (Schroer 2009). At the same time, our research confirms that the bottom-up processes of debordering, rather than the desire to maintain Polish-German relations at the social bond level, are directed towards the border as a resource (allowing contact, promoting differentials, hybridisation, symbolic resource; Sohn 2014b).

For our study was exploratory, the attempt to generalise the collected data and conclusions has its limitations. It was conducted quite spontaneously at the very beginning of the COVID-19 pandemic in 2020. We decided to interview our previous interviewees for two reasons. First, we were convinced that we were dealing with a unique situation, and it was almost the duty of social scientists to understand it. Thus, it became possible to identify several dimensions of border residents' reactions to the situation of pandemics and border closure. Second, we treated the situation as a breakdown in the everyday lives of the inhabitants of the twin cities. The realisation of many daily activities—both professional and leisure—became impossible. This resulted in the intensification of border talks: the desire to share one's fears, problems, and emotions. For a good reason, however, they are primarily concerned with everyday life in the twin cities: the landscape, the undertaken activities, the perception of the immediate future. That is why we do not deepen the economic and geopolitical context in our analyses. At the same time, we recognise the need to include them in a furthermore in-depth studies of the consequences that the pandemic have and will have for border areas and their inhabitants.

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TRADE UNIONS AND BASIC INCOME: SOME DANISH EXPERIENCES

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ABSTRACT: Theoretically, there are many good arguments that unions should support a proposal on basic income. The main reason for the Danish trade unions resistance to basic income reform is that it would go against the short-term interest of the unions in organisational self-maintenance. Trade unions will lose power in relation to their members with a basic income. Trade unions have control over individual members by virtue of the collective agreement system and the labour law system. If you have a basic income system, the individual worker will decide when he or she wants to leave his workplace and strike. Suppose a single worker or a group of workers leave their workplace because of dissatisfaction with the working condition. In that case, they will be punished financially according to the rules of labour law rely on any support from their trade union.
KEYWORDS: basic income, trade unions, Denmark, political struggles, labour market policy

BASIC INCOME DEBATE IN DENMARK

2016 was a turning point both in the international and the Danish debate on basic income. Neoliberal globalisation and world order faced major changes. In Denmark, the logic of the competition state was criticised by many groups. It looked like a window opening for the basic income issue coming on the political agenda.

For several years, the basic income concept was rarely mentioned in the Danish press. When it finally was, it was used as a negative stereotype, often rejected without arguments or as some form of communism. Now it was suddenly positively mentioned as something interesting that was worth discussing. Where *Borgerlønsbevægelsen*, BIEN Denmark had previously been despaired and ignored, there were now inquiries from newspapers and other media about interviews and articles.

It started shortly after New Year 2016 with a lengthy article in the newspaper Information entitled *Time is ripe for basic income* (http://www.information.dk/556871). In a short period of time, it was shared over 10,000 times and with 100 comments. This rarely happens to an article in Information. The direct outcome of this was that Information decided to host a public debate on February 9: "Basic income – Utopia or Necessity?", with the participation of, among others, the English labour researcher and basic income theorist Guy Standing. Since then, the debate has continued in various broadcasts on Danish Radio.

Another reason for the new basic income debate was that the new party, the Alternative, surprisingly to most, was represented in the parliament in the election in June 2015, winning 11 seats. On the new party's social agenda was *kontanthjælp uden modkrav* (cash benefit without requirements). The implication of this was the abolition of so-called activation or workfare.

Then, the Danish media discovered that the basic income issue had risen even higher on the international political agenda. By 2016, the Finnish government and several Dutch cities announced launching local basic income experiments. The greatest attention in all the world's leading newspapers and magazines received a referendum on basic income in Switzerland on 5 June 2016.

In Denmark's debate on basic income, some prominent unionists have shown interest in a basic income debate without directly entering as clear supporters of basic income. See post in the basic income conference by the Alternative March 2018 (https://www.youtube.com/watch?v=Y0JBmVArjj4&index=10&list=PLR9QHpZthn6yHjN9f-boZQqb_AI7DAIlbu).

In the last year, BIEN Denmark has attempted to debate with representatives of the Danish trade union movement on basic income because we consider it crucial for the basic income debate that more unionists become followers of the basic income case.

That is the background of this article. If you want to gain support for basic income in the trade union movement, you must analyse the interests of the trade union movement in supporting a basic income policy.

Therefore, in this paper, I will try more systematically to explain under what conditions an unconditional basic income would be beneficial for the trade union movement. And I will try to understand why some unionists think basic income can create

difficulties and be a disadvantage of the trade union movement (Christensen 2017).

WHAT IS A TRADE UNION?

A trade union is an association of wage earners whose goal is to reduce the mutual competition for collectively strengthening employers in negotiations on pay and working conditions. Without collective agreements, the workers would be subjected to mutual "wage pressure" (offer to sell themselves cheaper) and "morakkeri" (offer to work more than usual).

COMPETITION BETWEEN UNIONS

A trade union does not remove competition between workers. It only brings competition to another level by creating competition between different unions and groups of workers. There will always be border issues between unions. Who should organise which workers, and are there any types of workers that some unions do not want to organise, perhaps because employers are not so interested in hiring them?

EXCLUSIVITY AND GROUP SELFISHNESS

This means that a trade union always gets its collective power by limiting itself to others, being exclusive and excluding potential members who may be too weak and may weaken them relative to employers. This is the reason why unions and large parts of the labour movement have been interested in maintaining a gap between workers prepared for the labour market in the unemployment insurance funds (labour market policy) and workers with problems with social assistance (social policy). All trade unions are particular interest associations that are potentially in competition and opposition to other unions. Only an association of trade unions like LO tries to defend the interests of all trade unions.

THE DIFFERENCE IN THE INTERESTS OF THE WORKERS AND THE INTERESTS OF THE TRADE UNIONS

In general, it is essential to distinguish between the interests of the workers and the interests of the trade unions. Trade unions often handle the claims of the workers, but in addition (like all organisations) develop an interest in maintaining themselves. Trade unions get a collective power in relation to employers and to the workers and members (by the collective agreements and in the formation of strike funds).

With a basic income, parts of the power are returned to the individual worker. It is now the individual worker who decides whether he or she still wishes to work or strike. This means, as previously said, not that unions become redundant, but only that a UBI would empower the individual works not only in relation to the employer but also in relation to the union as an organisation. With a basic income, the individual will not, in the same way, be forced to submit to the trade union organisation but could now join the trade union from a more personal assessment of whether the union actually

take care of his / her interests.

This may be a fundamental reason for unions' scepticism towards the basic income idea. But resistance must also be seen from a historical perspective.

THE TRADITION FOR THE SEPARATION OF ECONOMIC (TRADE UNIONS) AND POLITICAL (POLITICAL PARTIES) STRUGGLES

In the labour movement, there is a tradition of distinguishing clearly between economic and political struggles of the labour movement, practised through two different institutional systems. The economic struggle occurs in the labour market, where the trade union movement and employers have significant influence and autonomy. Here you focus on the unemployed who can immediately work in the labour market and have unemployment insurance funds. Outside the labour market and unemployment insurance system is the social assistance system. It is the field for social policy legislation in the parliament. In the labour movement, it is the job of their political parties, traditionally the Social Democratic Party and other socialist parties. Both trade unions and employers have been interested in not mixing labour market and social policy together because both partners have an immediate interest in keeping the weakest unemployed outside the unemployment funds for competitive reasons. For trade unions, it has been important to reduce competition between workers and employers to be able to get sufficient skilled labour.

FROM THE WELFARE STATE'S SEPARATION INTO THE COMPETITIVE STATE'S INTEGRATION OF LABOUR MARKET POLICY AND SOCIAL POLICY

In the last 15 years, step by step, a paradigm shift has taken place in the Danish labour market and social policy, where the role of the trade union movement and the unemployment insurance funds has been weakened. The welfare state's separation of the labour market and social policy has been slowly replaced by the integration of the two institutional fields by the competition state.

Previously, there was a municipal organised social assistance system and a state-organised unemployment insurance system. In the municipal reform in 2007, they were organizationally merged into an almost single municipal system. It was an attack on the social partners (trade unions and employers) great influence on labour market policy, which in particular meant a weakening of the trade union movement and the role of the unemployment insurance system.

At the same time, social policy has increasingly been subject to labour market policy. Symbolically, it started at the government's turn in 2001, where labour market policy changed its name to employment policy and where a new employment ministry was created. Several former social policy areas such as activation of social assistance recipients, rehabilitation, sickness and maternity benefits, and early retirement pensions, etc., moved now from the old Ministry of Social Affairs to the new Ministry of Employment.

This development has only been possible because the trade union movement's in-

fluence over the past many years has been weakened. The unemployment insurance funds have lost members because it has become harder to become a member, and the unemployment insurance funds seem less than previously to function as a recruitment channel for the trade unions.

Recognising that social and social policy is becoming increasingly integrated, it would be natural if the trade union movement set itself the goal of creating a new relationship between the unemployment insurance system and the social assistance system. This would remove the institutional gap between the upper class among the workers (in the unemployment system) and the underclass among the workers (in the social assistance system).

This could pave the way for a new unit system with unconditional basic income at the bottom. If the trade union movement and left-wing in the parliament were in the offensive in this area, they could help prevent such a system from being dictated by neoliberal premises (reduced benefits with stricter availability requirements and reduced influence for trade unions and unemployment insurance funds). They could create a new system with significant advantages over the current system, partly because it would build on an unconditional basic income element.

What are the main arguments for trade unions to support the struggle for unconditional basic income?

STRENGTHENING THE NEGOTIATING POSITION OF THE WORKERS

Suppose an employer is not interested in seriously negotiating wages and improvement of working conditions. In that case, an individual worker may terminate his contract and leave the workplace because he would always be guaranteed an unconditional subsistence minimum. In other words, employers would be harder to scare people to become and adapt to a poor working conditions. Basic income thus represents a negotiating power for the individual worker.

COLLECTIVE STRIKE FUND

At the same time, it can also be seen as security of collective power in the form of a secured collective strike fund for a group of workers (a trade union), but with the difference that it is now the group of workers who share the collective strike fund and not the union.

Finally, a basic income will give the workers greater individual opportunities to negotiate different types of part-time jobs with employers and share jobs between workers.

DECOMMODIFICATION OF LABOUR

Viewed from a more theoretical perspective, a basic income represents a form of de-commodification of labour. It ensures that you can live outside the labour market without being subject to a basic obligation to labour. For socialists, it has always represented an important goal. Therefore, it is surprising that many socialists don't

support a basic income.

The most significant benefit for the labour movement would be to ensure more flexibility and more solidarity between the different parts of the working class. These are those who rarely are unemployed (the core of the current members of unemployment insurance funds), those who are often unemployed and constantly live with the threat of being thrown out of the unemployment insurance funds and finally, those who are outside the unemployment insurance (on social assistance or parts of the precariat, vulnerable groups of part-time workers, and those who do informal work).

All these groups will have a common objective interest in a basic income. And the trade union movement has an interest in organising and creating collective agreements for new groups – people who have a basic income and who only want a few hours of labour or are particularly vulnerable to unemployment (the new precariat). Currently, these groups don't have the opportunity to become members of trade unions.

In addition, the trade union movement could be liberated from the disciplinary tasks it has been imposed by the legislation. The unemployment insurance system, which is formally a private insurance system, is currently financed – for about 66% –by the state, which means that the funds are actually semi-governmental organisations governed by the state. The funds are by legislation imposed on a number of disciplinary tasks that make them unable to take care of the interests of their members effectively.

UNDERSTANDING SCEPTICISM AND QUESTIONS FROM THE TRADE UNION MOVEMENT

In principle, a number of arguments can be presented that it is in the trade union's interest to work for unconditional basic income as I have tried.

At the same time, I will try to understand why trade unions express scepticism about the idea of basic income and often put some questions to which immediate answers can be difficult to give.

If the state guarantees a basic income for everyone in work, both public and private employees, it will, of course, result in a wage decline corresponding to basic income. How will it be utilised by employers? Yes, public employers save a portion of public employees' wages, and the state will be able to use it to fund basic income. But what about the private employers? Will they score a win, or will they also be subject to some form of tax? The latter would be natural.

NEW ROLES FOR UNEMPLOYMENT FUNDS AND TRADE UNIONS

And what will happen to the jobs and the collective agreements? Will there not be more short-term and vulnerable jobs not in favour of workers? With a basic income, there will still be a need for unions and unemployment insurance funds. They just have to adapt to the new conditions that the state ensures an unconditional basic income not only for workers and union members but for all citizens.

It will certainly mean a reduced role for the unemployment insurance funds. But one can imagine that they will continue as more private insurance funds and as a supplement to the basic income for those who want to insure themselves against unemployment. A basic income will undoubtedly also mean that part-time work will become more widespread, why the entire collective agreement system may be different with several types of collective agreements, for example, 6, 12, 18, 24, 30 and 37 hours collective agreements.

Therefore, trade unions are on a whole new task of collecting a wide range of new part-time positions and small jobs. For the new class, the precariat, which, for the most part, consists of people with insecure employment conditions, a basic income will be absolutely necessary because the existing safety net is insufficient for this group.

A NATURAL CONSERVATISM

At the practical level, it is understandable that the unions and the unemployment insurance funds as organisations are sceptical of basic income. Basic income as a new income distribution system will inevitably mean changes to the structure and function of these organisations, and most organisations have built-in conservatism.

NEED FOR A NEW ROLE FOR THE TRADE UNION MOVEMENT

With a basic income, competition between workers (between those with social assistance, those with unemployment insurance, migrant-workers from Eastern European countries in the EU and refugees/immigrants) and between trade unions could be reduced. A basic income reform will force significant organisational changes in the trade union movement and unemployment insurance system. It will force the trade union movement to reconsider its role in society.

FEAR OF EXCLUSION

Another argument against basic income is that it will reinforce the exclusion mechanisms in the labour market. The argument is that basic income will park large sections of the population outside the labour market. It will free society from offering jobs to the unemployed and could be a relatively easy and cheap way to pursue a social policy. Some groups will only have a basic income and be permanently excluded from the labour market.

The argument is somewhat peculiar in the way that one sets out a bogey that fits today's society. Today, you just park a large group outside the labour market and impose some rules on them, which means they are having difficulty entering the labour market. A basic income will both create greater flexibility and security so that it is easier both to enter and leave the labour market without losing the basic income.

The claim that the community with a basic income will fail the vulnerable groups need not become a reality if those who are particularly vulnerable, who cannot supplement their basic income with a part-time job (due to disability and illness) in addition to their basic income, are entitled to special benefits, as is the case today. In addition,

one might think that there was a form of guaranteed jobs in the public sector next to a guaranteed basic income.

30-HOURS WORKING WEEK

Part of the left-wing movement in the trade union movement has fought for a working-time reduction, a 30-hour working week. Some observers have seen it as an alternative to the implementation of unconditional basic income. It does not have to be perceived as an alternative. It should rather be seen as two proposals that complement and support each other.

What is the background for the desire to prioritise free time and informal work? Many in the labour market feel stressed and want reduced working hours to achieve a better balance between labour and family life. As we grow richer, more people want to prioritise leisure rather than material prosperity. In addition, a reduced labour time could reduce the environmental impact.

Some in the labour market feel that they have too much money and too little time, while some outside the labour market, conversely, think that they have too much time but lack money. In this perspective, it can be said today that there are two groups. On the one hand, money-rich and time-poor families are in the labour market, and, on the other hand, time-rich and money-poor families are outside the labour market.

Both groups seem locked in some bad circles. The money-rich ones who are time-poor have difficulty converting money into time without losing a lot of money because there is a rigid collective agreement system. On the other hand, the time-rich, who are money-poor, have difficulties converting their time to money because of rigid rules for unemployment benefits, rules for cash benefits and early retirement, and because large parts of the labour market require full-time employees.

FREEDOM OF CHOICE

Ideally, a collective reduction in working hours will contribute to resolving the opposition between these two groups by creating new jobs and giving the workers more leisure time. A key question, however, is whether a new common standard for working hours in the labour market will provide more real opportunities for all groups for a choice between working hours and leisure time. The labour market will still be rigid by having only one common norm for the working time that does not add to more individual choices.

At the same time, it is highly uncertain how many new jobs a working-time reduction could create and whether they would be of a kind that is attractive to those outside the labour market.

THE FLEXIBLE WORKING TIME REDUCTION: AN UNCONDITIONAL BASIC INCOME

However, there is another mechanism than a working-time reduction in the formal labour market, which can also convert money to time for the rich and make time for

money for the poor – and with greater individual flexibility. It is an unconditional basic income.

With unconditional basic income, all people will, for the first time, have the opportunity to choose freely whether they want to go for a job. The effect will be double. Some will, of course, choose to leave the labour market to get more time because they are now sure to have money. Others who have had a hard time finding a job will, conversely, enter the labour market because it is easier to get a job at, for example, part-time, as you now have a guaranteed income without rules of reductions in unemployment benefits and cash benefits.

Those who want to leave the labour market for some time will typically be groups who want leave for education, family care time, care for their own health or starting a new job or business. The advantage of unconditional basic income in relation to the previously known leave schemes and entrepreneurial support schemes is that they are not linked to a particular activity that has to be approved bureaucratically and that they are temporarily unlimited.

Those who wish to enter the labour market will, for example, be the recipients of transfer income, which has hitherto been difficult to get a part-time job. With unconditional basic income, it will always make work pay, no matter how modest the pay is.

CONCLUSION

In the previous analysis, I have listed a number of arguments that trade unions should be able to support a basic income policy, while I have also tried to understand some of the arguments most often presented by Danish trade unions against basic income.

Why should the trade union movement support a basic income policy? Firstly, because it is clearly for the benefit of the workers. Ideally, trade unions must defend the interests of the workers and not just their own organisational interests in maintaining themselves.

The other thing that speaks for a basic income is a suitable policy for the trade union movement is that the basic income side is directly in line with the basic features of the Danish welfare model. A strength of the Danish welfare model is that it is universal and tax-financed. This means that everyone has equal access to health and education. There is a universal Danish population pension model, and childcare benefits have been universally up to a few years ago. But there is no universality in the transfer payment. In practice, the Danish model approached a pure basic income model in the 1970s with the social reform in 1974 and practice in the late 1980s by the generous coverage of unemployment benefit and the smooth management of the social assistance system.

Another feature of Danish society is the so-called flexicurity model in the labour market. This model contains three elements: (i) flexibility, (ii) economic security and (iii) an active labour market policy. This model can also be seen to fit well into a basic income scheme.

In recent years the model has been weakened: the economic security has been cut. It has also meant that flexibility has been reduced and that active labour market policy

in the form of training opportunities has been neglected.

In relation to this, a basic income could renew and revitalise the Danish flexicurity model. It would create guaranteed economic security for all. This would enhance both the flexibility and the potential for a better labour market policy, as it would provide the opportunity for lifelong learning, including continuing education to the labour market with a basic income. With a basic income, it would be voluntary to receive education and not forced by the needs of the labour market.

A new feature that might speak for the possibility that the trade union movement in the future would be more positive towards the basic income idea is that the Danish trade union movement has recently decided an association process, when the LO, the central organisation for manual workers, has decided to merge with the main organisation of the white-collar workers (FTF). One can expect that this merging process will in the future also lead to the merging of a number of unemployment funds. In this connection, one could imagine that the trade union movement at the same time began to look at the relationship between the social assistance system and the unemployment insurance system.

Even though it would be a clear benefit from the perspective of individual workers with a basic income reform, the likelihood that the trade union movement – like the situation at the moment – will move towards a basic income policy is not particularly remarkable.

The main reason for the Danish trade unions resistance to basic income reform is that it would go against the short-term interest of the unions in organisational self-maintenance. Trade unions will lose power in relation to their members with a basic income. Trade unions have power over individual members by virtue of the collective agreement system and the labour law system. If you have a basic income system, the individual worker will decide when he or she wants to leave his workplace and strike. Suppose a single worker or a group of workers leave their workplace because of dissatisfaction with the working condition. In that case, they will be banned (be punished financially) according to the rules of labour law relying on any support from their trade union.

Denmark's current economic policy situation is also against that trade unions should face a new basic income policy. Internationally, the Danish (and Norwegian, Swedish) trade union movement is relatively strong with high organisational percentages. In recent years, the inequality in Denmark has risen relatively sharply but is still limited from the international perspective. The precariat is also growing in Denmark but in this area less than in many other countries. In addition, the Danish trade union movement is trying to develop a policy for digital platforms. And at the very least, Denmark is in a boom where unemployment is relatively low. At the same time, despite the deterioration of social security, it remains relatively high in the European context.

If the trade union movement in the future takes the basic income idea into its reform program, it would probably happen with some form of cooperation with the Social Democratic party. Although it is a long time since the organisational ties between the trade union movement and the Social Democratic party have been cut, it is still the

case that many the trade union bureaucrats are social democrats, and there is close cooperation between parts of the trade union movement and the Social Democratic party. And in Denmark, the Social Democratic party has always been opposed to basic income.

Surprisingly, it may seem that it would be easy to introduce basic income in Denmark. In short, it is only about replacing the current cash benefit system with unconditional basic income and transforming the unemployment insurance system on top of the basic income element.

The current system, however, is based on a very dominant work ethic and self-sufficiency ideology. Moreover, in Denmark, there is a highly organised labour market system with strong social-democratically oriented unions which have great interests in maintaining the current system.

Therefore, my conclusion is that only when the Danish welfare model is exposed to stronger deterioration and greater shocks (economic crises) will be opportunities for a broader debate on basic income in more significant parts of the trade union movement.

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THE DISUNITED STATES' DECOUPLING FROM ITS FORLORN FOREIGN AFFAIRS' ENTANGLEMENTS

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ABSTRACT: The short-term 'reign' of the United States as leader of the world, policeman of the world, is being seriously challenged not only by pundits all over the world but by even political scientists and analysts in the United States itself. In fact, many are seriously opining that the United States is in decline—that it has lost its sense of direction, has taken itself too seriously, and has led the world for its own profit and well-being while disregarding the realities of other nations and peoples. The article attempts to trace the reasons for this sudden reversal of popularity of the DisUnited States of America.

KEYWORDS: foreign affairs, United States diplomacy, world affairs, American history

The Big Pullback, the licking of wounds, is getting into full swing. (Will Americans be sore losers!) Americans are slowly, but surely, coming to the realization that their 'crusade' to corner the world's business squalidness was just a cockeyed daydream after all. What had started to be an attempt to substitute the threat of a new world war, the third, with Judeo-Christian 'Democratic' Capitalism, in the end, blew up in the faces of the editors of the *Harvard Business Review, National Review,* and the gung-ho forces of the Pentagon. The carrot and the stick, the soft power and the hard power, perhaps worked well at the outset. Still, in the end the whole affair sank into a Black Hole of Greed, Corruption, Hedonism, and Incomprehensible Stupidity bringing forth an immeasurable amount of human suffering—perhaps even more than that cre-

ated during the whole of the grotesque twentieth century.

Pulling out of Afghanistan was not a military defeat. It was not some contingency plan gone awry. It was not a tactical nonachievement. It was not a strategic blunder. No, it was worse than that. It was evident that Judeo-Christian 'Democratic' Capitalism (*Quod erat demonstrandum*: Western Civilization One [Europe] & Western Civilization Two [the DisUnited States of America]) had for sure slumped into dissolution. In his most crystal clear moments, Marx most lucidly defended the rights of the workers who, throughout the world, had been left naked to be exploited by the employer in a scheme called capitalism where the employee was at the mercy of the employer. An arrangement, a ruse, between the employer and the employee but primed by the employer! Also, Marx rightly said that if you gave the capitalists enough leash, they would eventually hang themselves. They did! And it was the Chinese and the Russians who gave them the rope—*avec plaisir!*

What did the collective consciousness of the DisUnited States accomplish to arrive at this state of disintegration that it finds itself trapped in today? Where and when did it begin to decline—and why so rapidly? Was that Soviet poet right when he predicted that the DisUnited States was like a comet—at first, it burns brightly, but surely it then burns out prematurely? Why had no one told this baby nation not to play with matches?

With the fading away of the British empire, for a while, the world had no hope in having a discriminating policeman on the beat—the only 'law officer' was a moustached malignant, necrophilic aggressor who had to be, and would be, eliminated (by the Soviets, stupid!) from the world view. The socio-economic classes could not be left on their own—free to manoeuvre at will. The horribleness of the Second World War necessitated a benign leader, a lighthouse to which all global community members could refer to for sustenance and protection against those nefarious elements that threatened them. It would be a long, arduous road to travel to succeed in creating a worldly detente worthy of everyone's respect and endorsement. That finish has not been reached.

At the end of the Second World War, the United States put on the mantel of superpower, the world's parvenue policeman. It also participated—qualified to do so because of its myriad military successes—in the division of conquered lands with other 'victorious' war contestants. Not only did the United States, not yet the DisUnited States, not actually comprehend the extent of the real estate it had suddenly inherited, it had to find out where it was, how much territory had been piled up, and then register the number of holdings, giving them legal jurisdiction. This task challenged the number of material possessions acquired by the Vatican in Rome throughout the centuries. Then what?

The dropping of the atomic bombs on Japan was the hideous nonaccomplishment

the baby nation's aggressive foreign policy would ever make and just at the outset of its fledgling history; and, today it is not only that tragedy that irks sixty-per cent (Asian) of the world's population, but also the spectre of the Korean and Vietnam debacles. And what do the Asians say about Iraq, Iran, and Afghanistan? They are more than cautious. Wouldn't you be? They observe an arrogant, self-righteous United States, by now the DisUnited States, divorced from reality, their own reality and that of the rest of the world's, quick to be always ethically letter-perfect even when they are not—when they are forever contradicting themselves. Americans are a wonderful people if they are not bombing you; so, who is America not bombing?

But you do not govern our universe with projectiles alone. In the American DNA, there exists a keen sense of the import of psychology. (Psychological warfare is one of the masterstrokes of the Pentagon: "Once you've got them by their b***s, their hearts and minds will follow.") The military-industrial complex is more about making money than giving out medals and counting MIAs and KIAs. It had to be money, that cure-all, that would be the rallying cry of Judeo-Christian 'Democratic' Capitalism. In the hearts and minds of all Americans, the thoughts of George Bernard Shaw (1856-1950) are brainwashed: "The universal regard for money is the one hopeful fact in our civilization, the one sound spot in our social conscience. Money is the most important thing in the world. It represents health, strength, honour, generosity, and beauty as conspicuously as the want of it represents illness, weakness, disgrace, meanness, and ugliness." It would be money—lots of it!—that the American government would print and employ to cajole, blackmail, influence, to do what was necessary to get its way, wherever it went. Marx had to be eliminated from the 'literature,' and he was supplanted by types monkeying Milton Friedman. (See *The Philosophy of Money* authored by Georg Simmel [1858-1918]).

The material exigencies have been taken care of with paper, eventually, without value, Monopoly $$$, play money, the Americans had to go for the incorporeal features of the human being, the psyche. They were obsessed with demonstrating to the world that they were as good as, even better than, all others—especially the Europeans whom they had left in disgust and even ire.

When the first colonists from Europe landed on American soil, they did not bring many of their European possessions on the long journey across the Atlantic Ocean. They came with almost nothing; but, they did bring dictionaries and Bibles. The only literature the early Americans possessed was the fire and brimstone of their Christian bibles. Those Good Books would set the tone of the American self-righteousness that would define its *raison d'etre* for doing what Caesar and Napoleon themselves had failed to do. The fervency to be in the right—even, obviously, fanatically so—characterizes still today the DisUnited States' quest to be the best (exceptionalism, superiority, and confirmation complex) in everything they try to fulfil. The very people who escaped the economic and political cruelty of the Old World in the New would do everything to imitate the capriccios of their ancestors in the Old World. To add insult to injury,

the neophyte Americans were haunted with an inferiority complex. After all, had not the ex-Europeans, now colonists, been profiled throughout the world as drunks, psychiatric problems, criminals, adventurers, cowboys? These marginals would spend the rest of their short History attempting to establish their exceptionalism and superiority. They were out to out-Europe Europe—at any cost. Relying on a Christian-Judaic utopia, they have exhausted themselves in doing so. Oh, if only America had been colonized by the humane principles of Confucianism and its idea of sincerity and not the hateful, bellicose Christianity! ("No kingdom has ever had as many civil wars as the kingdom of Jesus Christ." Montesquieu (1689-1755); *Persian Letters*, 1721.) Pope Francis ought to know by now that most people in the world do not believe that Mary was a virgin when she conceived Jesus Christ.

A *modus operandi* had to be instituted. You just can't occupy, at first, a nation with military aggression. That's old school. Teddy Roosevelt tried the carrot, then reverted to the stick to get his way. No, the carrot had to be more convincing, more economically efficient, more *simpatico*. It had to be 'soft power.' Coca-Cola, McDonald's, Kentucky Fried Chicken, Rock n' Roll, basketball, American football, Hollywood, television—all those attributes which had established America's 'good guy' presence on the world stage. The cops always captured the criminals. If they had not shot them dead, the handsome actor always married the beautiful actress. What a Happy Hunting Ground we all could enjoy!

For a long time, dictators, presidents, drug lords, generals, and prime ministers were inveigled into accepting dollars to join in on the big splash of Judeo-Christian 'Democratic' Capitalism. These "leaders" had to be converted to conform and believe. Many of them sent their sons and daughters to Harvard to study for MBAs, suck up the American 'Culture,' imitate it, and bring it home to the masses in their own countries. Harvard alumni and alumnae begged their fathers to monkey the Americans and get richer doing so. Significant infrastructure and building deals were talked about. The hope in a new future was the dream of many developing countries, and American economists were on the spot to cajole and advise and offer hope… *provided!*

The initial contacts by the American businessmen had to be, naturally, with the privileged classes of the countries they had desired to bring to the brim with Cokes and french fries. Usually, these leaders were already wealthy and keen on installing hamburger joints, Coca-Cola distilleries, and even supermarkets. The Rockefeller family had built the CADA food chain in Venezuela and later had sold it to well-off Venezuelans. Again, the Rockefeller dynasty constructed the ESSELUNGA chain of supermarkets in Italy, afterwards selling it to flush Italians. As long as the rich were getting richer, the poor were getting poorer. This goody gumdrops arrangement functioned very well for the few until the rabble, the poor, came to understand that their Big Macs and Diet Cokes were making their rich fellows comfortable while they were slaving to keep alive as best they could. In some countries, the antagonism became so severe, and arms dealers rushed in to sell rifles and grenade launchers and tanks and

jeeps, *ad infinitum,* to quell the rambunctiousness of the *hoi polloi* naturally stimulated to renegade by Marxist doctrine and Leninist diatribes. With the passing years, the hostility matured and nurtured, and the asymmetry of power, between the ruling classes and masses became distorted, out of control. The DisUnited States began to look like the fool it really was—the fall guy who had taken on the task of putting the world aright. The only solution was to sell more arms. (As one dumb Jesuit theologian has put it so succinctly: 'God works in strange ways.')

Another facet of the United States' megalomanic obsession to hold court for the world's commercial interests was the notion that we could unite into one sizeable moneymaking family that would see all of us living happily ever after in that Happy Hunting Ground. In the eyes of one New York journalist, the planet would become 'flat,' and just and equal for all.

Two convulsive broadsides would push this Laputan castle in the air asunder. The first was John Kenneth Galbraith's (1908-2006, Canadian economist; author of *The Affluent Society* [1958]*;* and, the one who wished to his dying hour to be bequeathed with the Nobel Prize in Economics), who once quipped: "The task of a government is to guarantee that the poor have enough to eat and enough work so that they do not disturb the rich. Only a very stupid conservative is truly conservative." This paternalistic jibe—even 'stupid' as it has turned out to be—is a modern-day take on the Romans' plug, *panem et circenses*; and, both the Romans and the owners of the East India Company (1601) would infuriate the disciples of Marxism and Communism, and eventually, those patriarchal bromides would boost the sales of *The Communist Manifesto* (1848).

In *The Communist Manifesto,* Marx and Engels stimulated the world's workers to unite and tear down the injustices of the capitalistic system. They wanted to create an atmosphere where all might enjoy a fair shake and not just JKG's conservatives. But what had happened in the end was that the workers of the world united to become capitalists—not Marxists or Communists!

It had been evident to John Kenneth Galbraith that capitalism could survive *if* 'the great unwashed' might have their basic needs, and maybe a little more, to make them feel they were participants in the Judeo-Christian 'Democratic' Ballyhoo, and not under the thumb of a sweatshop tyrant or some IRS bureaucrat. There had to be The Boss (Robber Baron?) to keep things in order, under control. The rank and file had to be kept docile for capitalism to function. Too many cooks spoil the broth.

Globalization changed all that. An African in his hut in the Sahara desert could now connect with his stockbroker in Manhattan and click the stock options he wished to own at the New York Stock Exchange. Capitalism had begun to run amuck—JKG's worst nightmare. Implicit in JKG's mind was the idea that the success of capitalism would be its demise. How could everyone in the world (3,000,000,000 of us in 1960;

8,000,000,000 in 2025) live on a Happy Hunting Ground? Today, Harvard professors continue to believe in the blessed future of capitalism. Even Mark Zuckerberg! He keeps spreading The Word: Hope in Friendship, Fame, & Fortune—for all of us, thanks to him. All we are left to do is keep praying for the goodies to be delivered to every villa, penthouse, house, hut, and park bench throughout the world by you know who!

Still, there was the other horrific barrage: Globalization's real dilemma was that the 'developing' countries were pilfering as they had been taught to by the "developed" countries since 1601—and even better so. The capitalist world was not on its way to finding a satisfactory solution to this quandary, and none is in sight. "The tyrant grinds down his slaves, and they don't turn against him; they crush those beneath them" (Bronte 2000 [1847]: 144). The capitalist world sinks, farther and farther every day now, into a Black Hole of Greed, Corruption, Hedonism, and Implacable Stupidity. Alain Minc, the author of *Le Nouveau Moyen* Âge (Editions Gallimard, 1993), predicted that Europe, especially without the United States-Nato duo, would turn into a continent of roving criminal organizations. How much do you want to bet?

Where does this leave our once beloved DisUnited States? In the Americas! The 'Americans' will no longer be referred to as 'Americans,' but 'North Americans!' And they will be looked upon nostalgically as some sort of museum piece. In those 'banana republics' is where, there, they will regroup, set a new course hopefully much more sagacious, read again the Bible where St. Paul says that "charity begins at home," and thumb their way through Sun Tzu's *The Art of War* and come to that page where he says, I paraphrase, fight to win foreign wars and when you do go home and don't stay depleting the resources of your own citizens. The latter have to pay for your overseas' gambles. North Americans are about to study Spanish, and it might be wise of them to lobby (GOING OUT OF BUSINESS sale!) to transfer the Vatican to Coral Gables, Florida.

Have a nice nightmare!
It's a jungle out there!

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